Stephanie Hofmann & Bobby Neuhold
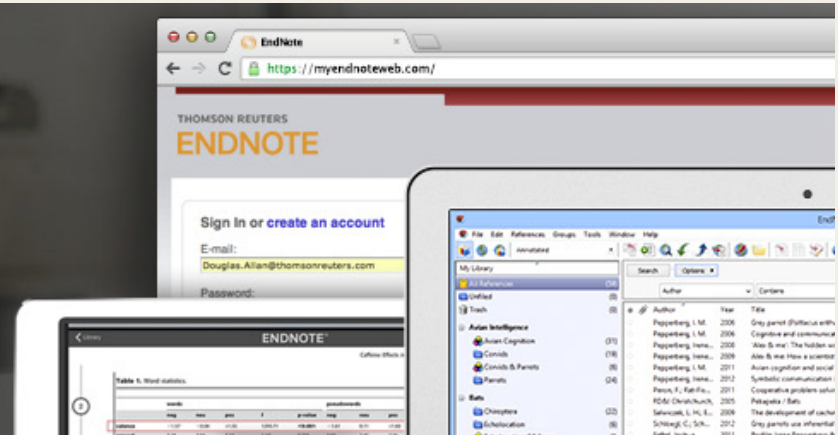
contact: info@lib4ri.ch

Literature Management with Endnote

* Screenshot www.endnote.com

Stephanie Hofmann & Bobby Neuhold

contact: info@lib4ri.ch

Welcome

Lib4RI Training Series

↳ Module 1
   Searching Scientific Information

↳ Module 2
   The Publication Process

↳ **Module 3**
   Literature Management with Endnote

Lib4RI

Library for the Research Institutes within
the ETH Domain: Eawag, Empa, PSI & WSL

Spring Sessions 2015

LIB4RI TRAINING SERIES

Searching & Managing Scientific Information

Lib4RI's introductory course for PhD students
and other affiliates of Eawag, Empa, PSI and WSL

MODULES
1 – Searching Scientific Information
2 – The Publication Process
3 – Literature Management

COURSE SITES
Eawag: Dübendorf
Empa: Dübendorf
PSI: Villigen
WSL: Birmensdorf

Online registration: www.lib4ri.ch/services/trainings.html

Module 3 – Literature Management with Endnote

9.00 – 9.15 **Introduction to Literature Management**

9.15 – 10.30 **Endnote**
Presentation & Live Session (Part 1)

10.30 – 10.45 Break

10.45 – 12.00 **Endnote**
Presentation & Live Session (Part 2)

Thanks for your feedback

Help us improve our training by returning the feedback form enclosed in your documentation!

Why Literature Management & Software?

Literature / Information Sources

- Books & book chapters
- Articles in journals & newspapers
- Conference proceedings
- Web pages
- Databases
- Software
- Images, audio & video, …

by Meghan Dougherty,
www.flickr.com,
CC BY-SA 2.0

Managing

- File, organise & update references (author, title, year …) and corresponding media (articles, books, …)
- Aim: a personal library for quick information retrieval & usage

Advantages of dedicated software

- Import, edit, organise, sort and retrieve metadata & media
- Access library via
  - Desktop & Laptop
  - Web
  - Smartphone & tablet
- Share content with colleagues
- Use library for the writing of reports, articles, theses
  - cite references in your text
  - generate bibliographies
  - select / change output styles according to the requirements

Reference Management Software – Features

↳ **Essential**

- Add metadata & PDFs
  - Import bibliographic information from databases & publishers
  - Add & edit manually
- Organise references
  - Type (eg article, book, …)
  - Metadata (authors, title, …)
  - Personal groups / folders
  - Sort, search, tag, …
- Find duplicates
- Read & annotate PDFs
- Cite references & create bibliographies in your word processor using various (editable) styles

↳ **Recommended**

- Built-in online search with (semi)-automatic import of references incl. PDFs
- Access from everywhere
  - PC, Mac, …
  - Online / Web
  - iOS / Android
- Share & collaborate
- Import / export metadata (& PDFs) from / to other reference management software
- …
- …

Common Reference Management Software

RefWorks

Docear — The Academic Literature Suite

Bookends

ENDNOTE X7
Collect. Collaborate. Create. From anywhere.

MENDELEY

SENTE 6

JabRef — reference manager

zotero

Citavi®

Papers 3

BibDesk
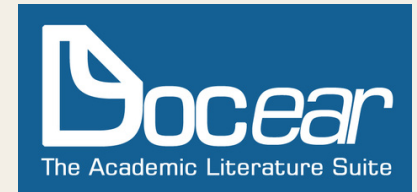
… and more

Common Reference Management Software

↳ **Endnote, Mendeley and Zotero**
  - Offer all a good variety of essential & recommended features

↳ **Endnote (Thomson Reuters)**
  - Work horse for literature management (1st release 1988)
  - Full licence (desktop version PC & Mac) can be obtained via your IT Services allowing for shared library use of up to 15 group members
  - Online web client (limited functionality without EN Desktop)
  - iOS (iPad) app available
  - www.endnote.com, www.myendnoteweb.com

↳ **Zotero (open source)**
  - Intuitive handling due to web browser integration (Firefox)
  - Free < 300Mb online storage (expandable $, Dropbox capable)
  - www.zotero.org

↳ **Mendeley (Elsevier)**
  - Strengths in sharing / networking / online collaboration
  - Free ≤ 2Gb, ≤ 3 group members (expandable $$$)
  - www.mendeley.com

Introduction to Endnote X7

- EN's GUI
  - Create a new library
  - Graphical User Interface

- Collect
  - Endnote's built-in online search
  - Export / import after an external database search
  - Import metadata from PDFs
  - Manually adding & altering references
  - Find & attach full text PDFs

- Organise
  - Building groups
  - Checking & Updating references
  - Finding duplicates
  - Searching references (incl. PDFs & annotations)
  - Backing up your library

- Cite
  - Bibliographic output styles
  - Cite-while-you-write (MS Word)
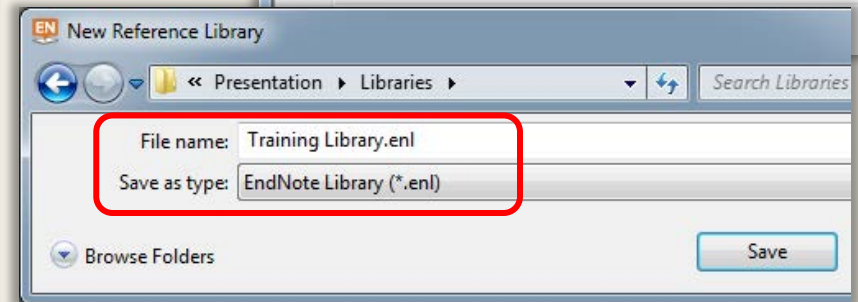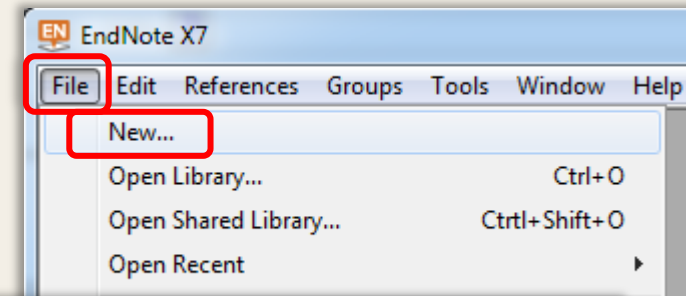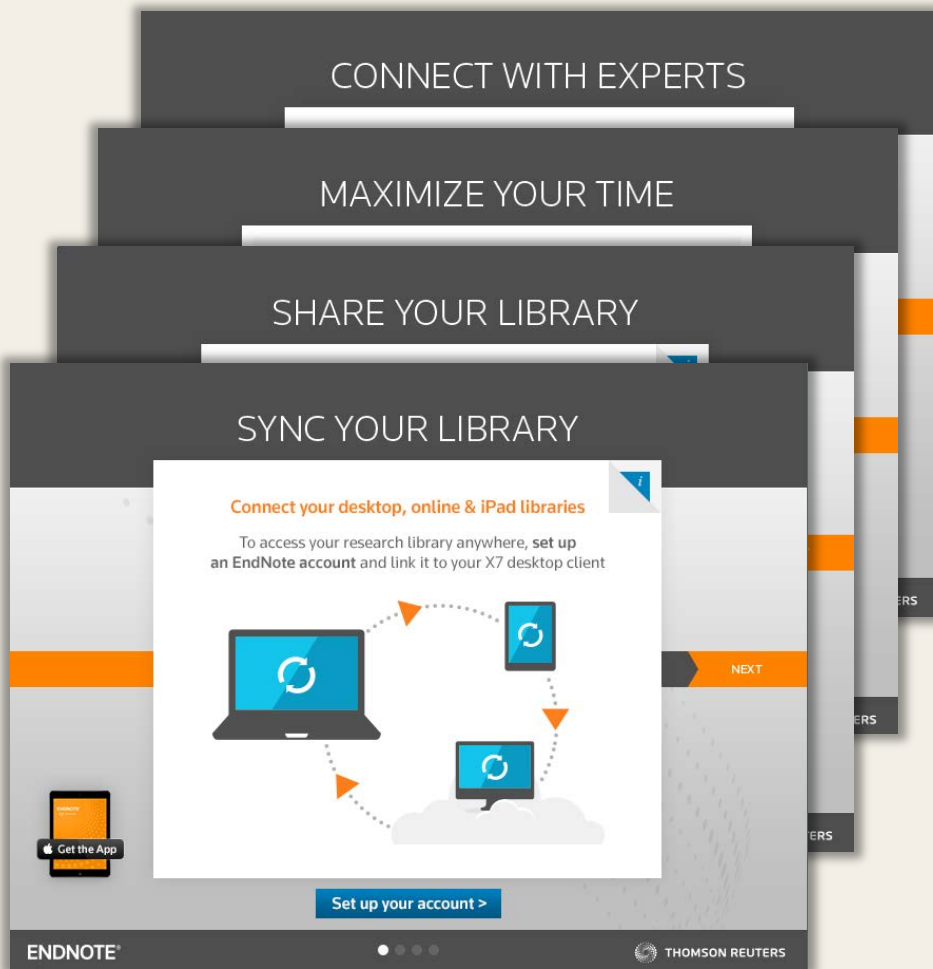 - Using journal abbreviations

- Share & Sync
  - Without EN Online Account
    - Share references via E-mail
    - Share travel library via Word plugin
    - Share library as a compressed library or via servers
  - With EN Online Account
    - Sync between your devices
    - Share entire library (EN X7.2 only)
    - Share groups (EN Online only)

- Concluding Info, Help & Useful Links
  - Endnote can do more
  - Is Endnote the right thing for me
  - User Guides & Tutorials
  - Support, Forum, FAQ, Blogs, Community, …

Create a New Endnote Library

CONNECT WITH EXPERTS

MAXIMIZE YOUR TIME

SHARE YOUR LIBRARY

SYNC YOUR LIBRARY

Connect your desktop, online & iPad libraries

To access your research library anywhere, **set up an EndNote account** and link it to your X7 desktop client

NEXT

Get the App

Set up your account >

ENDNOTE®   THOMSON REUTERS

EN EndNote X7

File Edit References Groups Tools Window Help

New...

Open Library...   Ctrl+O
Open Shared Library...   Ctrtl+Shift+O
Open Recent   ▶

EN New Reference Library

« Presentation ▸ Libraries ▸   ▼ | ↻ | Search Libraries

File name: Training Library.enl
Save as type: EndNote Library (*.enl)

Browse Folders   Save

- ✍ Tip: Endnote generates an *.ENL file and a *.DATA folder that need to stay together.
- ✍ Tip: While the *.ENL file is the library with all metadata, the *.DATA folder is the default location for attachments and also contains library related indexing files.

When EN opens for the first time a welcome screen asks you to setup your online account. There is no need to do this now. Just create a new or open an existing library via the <File> menu.
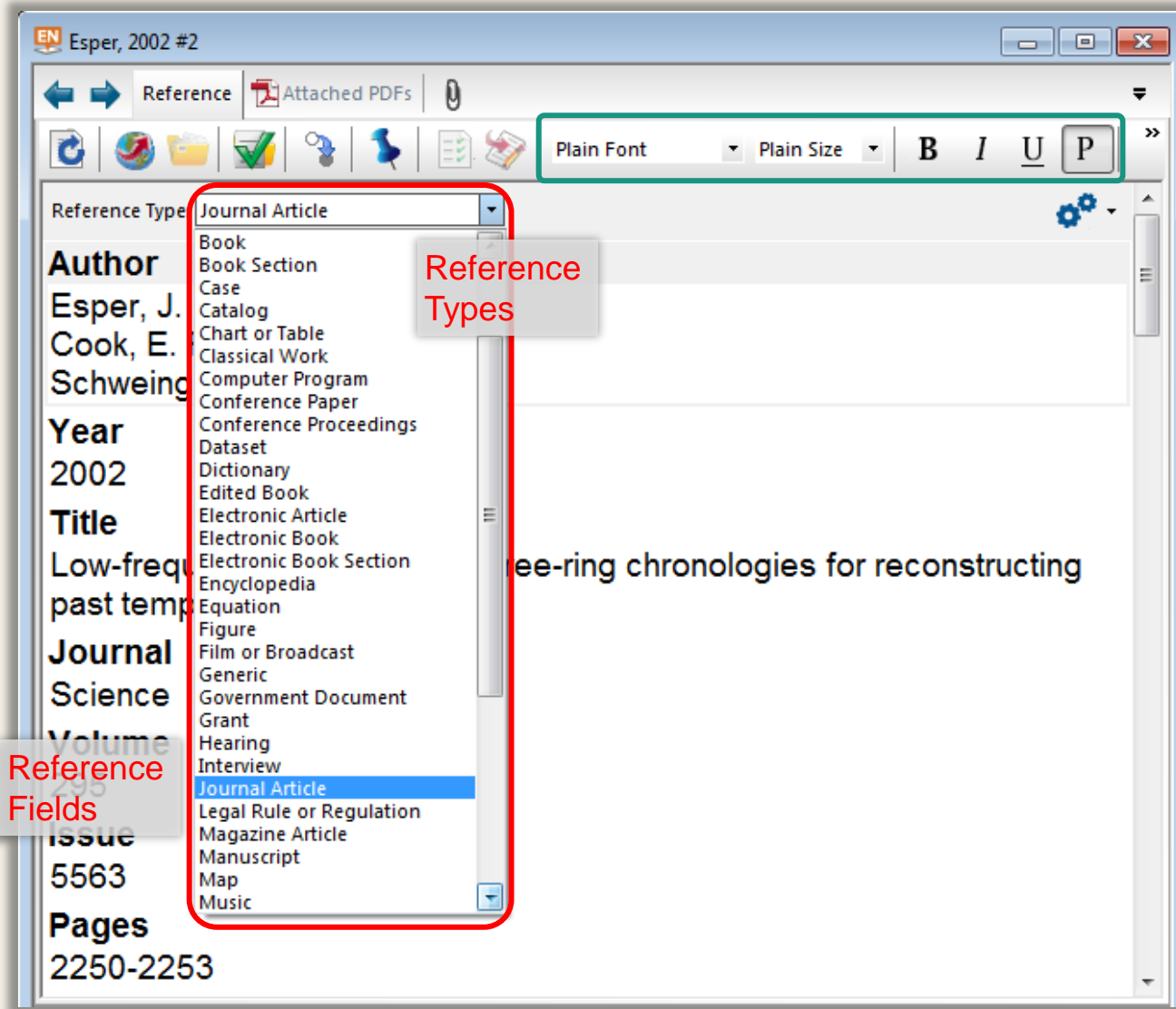
The Graphical User Interface – Main View

Output Style

Library Mode

Search panes

A double-click on an entry opens the single reference view

Groups pane (organise)

Reference list pane (sort & find)

Tabs pane (reference details, citation preview & PDF)

Adjust layout

The Graphical User Interface – Single Reference View

- Tip: Keep the formatting to <P> (Plain) or else it overrules the formatting of the <Output Style>

- Each reference is associated with a <Reference Type>, eg <Journal Article> and contains in its <Fields>, the metadata, eg <Author>

- Each <Output Style> use this information to generate citations and bibliography in your document

The Graphical User Interface – Citation Preview

Select an Output Style

…and get a glimpse on the effect of the selected <output style> via the preview pane

Chicago 16th Author-Date

Esper, J., E. R. Cook, and F. H. Schweingruber. 2002. "Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability." *Science* 295 (5563):2250-2253. doi: 10.1126/science.1066208.

The Graphical User Interface – PDF Viewer

…quick view via the tabs pane

…read and annotate in a separate window

Introduction to Endnote X7

- ↳ **EN's GUI**
  - Create a new library
  - Graphical User Interface

- ↳ **Collect**
  - Endnote's built-in online search
  - Export / import after an external database search
  - Import metadata from PDFs
  - Manually adding & altering references
  - Find & attach full text PDFs

- ↳ **Organise**
  - Building groups
  - Checking & Updating references
  - Finding duplicates
  - Searching references (incl. PDFs & annotations)
  - Backing up your library

- ↳ **Cite**
  - Bibliographic output styles
  - Cite-while-you-write (MS Word)
  - Using journal abbreviations

- ↳ **Share & Sync**
  - Without EN Online Account
    - Share references via E-mail
    - Share travel library via Word plugin
    - Share library as a compressed library or via servers
  - With EN Online Account
    - Sync between your devices
    - Share entire library (EN X7.2 only)
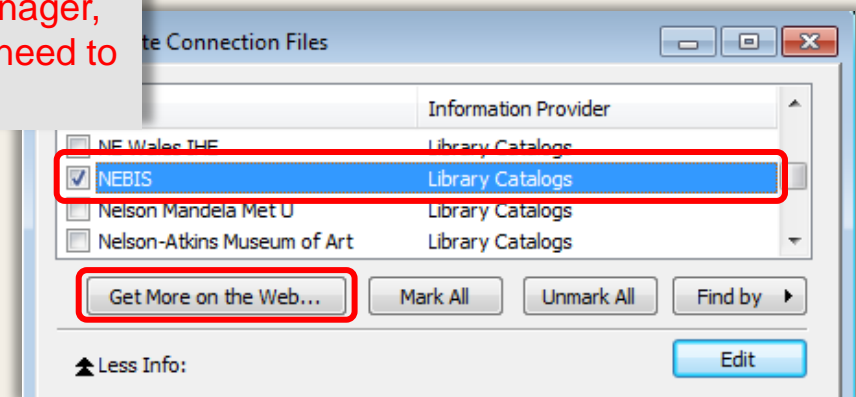   - Share groups (EN Online only)

- ↳ **Concluding Info, Help & Useful Links**
  - Endnote can do more
  - Is Endnote the right thing for me
  - User Guides & Tutorials
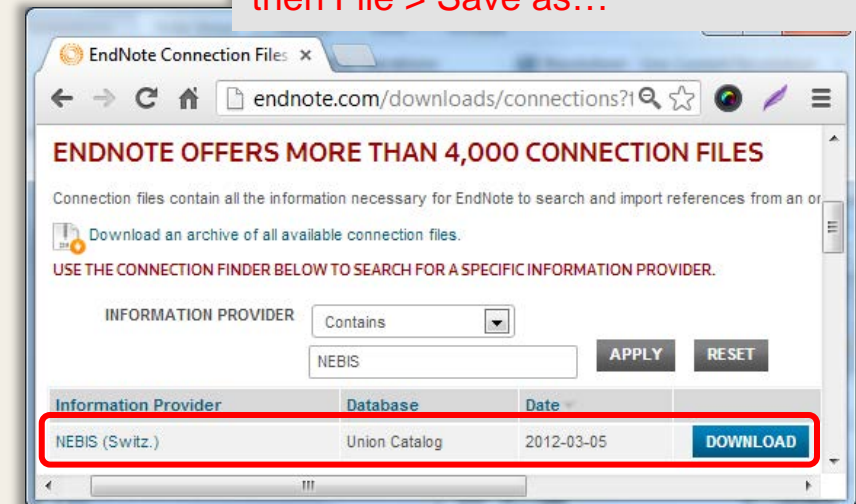 - Support, Forum, FAQ, Blogs, Community, …

Collect Metadata – EN's Built-in Online Search & Connection Files
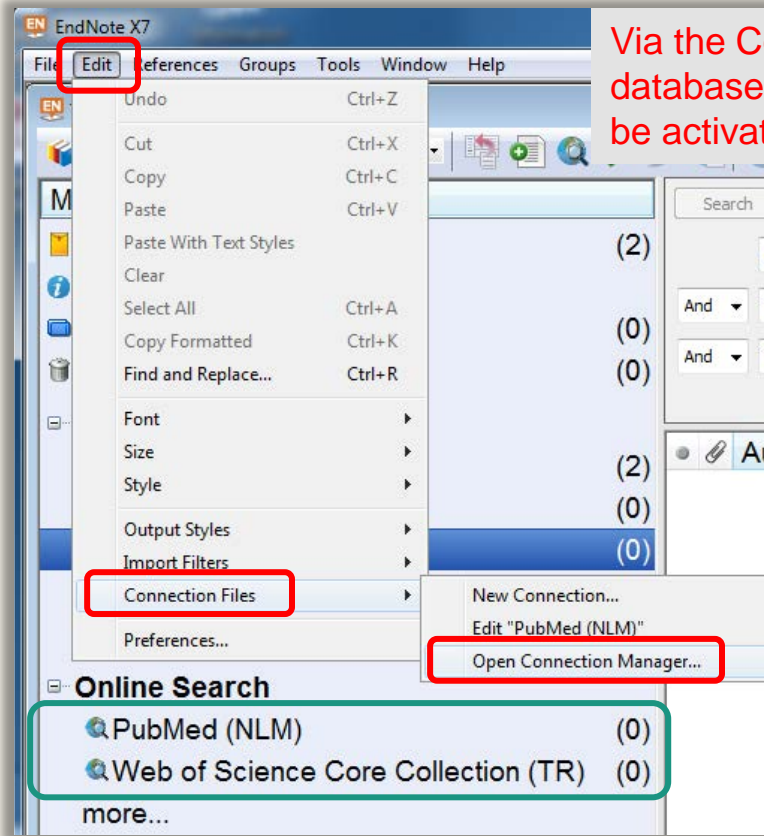
Via the Connection Manager, database connections need to be activated

Certain connection files (eg NEBIS) need to be downloaded from the web and installed via double-click, then File > Save as…
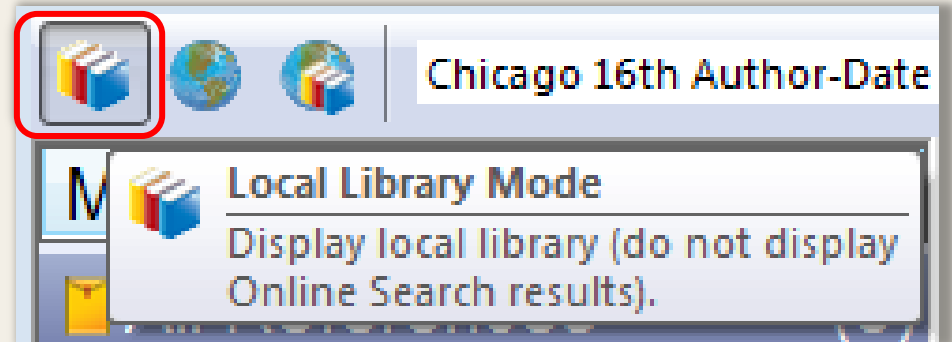
- ↳ By default, PubMed & Web of Science are activated
- ↳ A NEBIS connection file is available
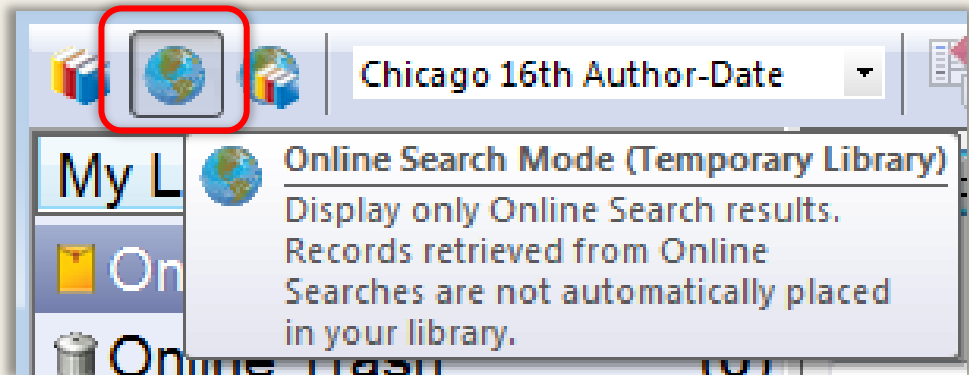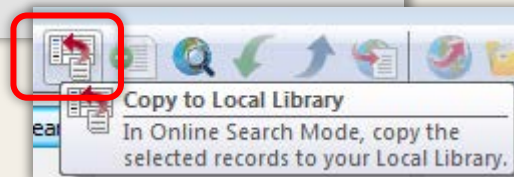- ↳ Scopus is NOT supported

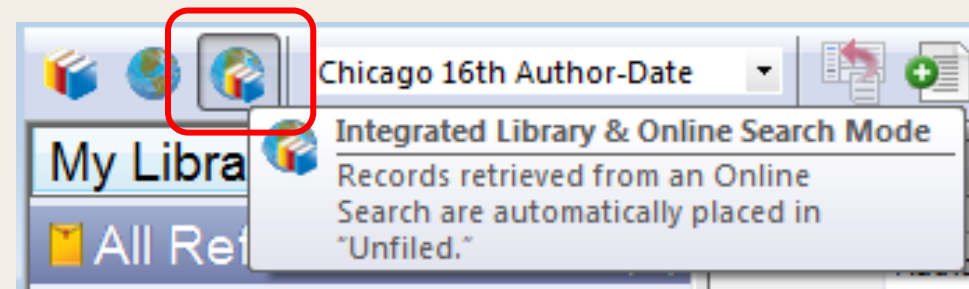# Collect Metadata – Endnote's Library & Search Modes

The 3 modes of Endnote

Local Library Mode:
Online Search not available

Chicago 16th Author-Date

Local Library Mode
Display local library (do not display Online Search results).

Online Search Mode:
Local library not available; selected search hits need to be transferred to local library

Copy to Local Library
In Online Search Mode, copy the selected records to your Local Library.

Chicago 16th Author-Date

My L

Online Search Mode (Temporary Library)
Display only Online Search results. Records retrieved from Online Searches are not automatically placed in your library.

Integrated Library & Online Search Mode (default):
All search hits are automatically transferred to local library

Chicago 16th Author-Date

My Libra

Integrated Library & Online Search Mode
Records retrieved from an Online Search are automatically placed in "Unfiled."

Collect Metadata – Endnote's Online Search (NEBIS)

1. Switch to Online Search Mode

2. Choose NEBIS

3. Submit Your Search Query

4. Select Reference

5. Copy Selection to Local Library

6. Switch back to Integrated Library and Online Search Mode

…et voilà

▪ Literature Managen

Collect Metadata – Endnote's Online Search (Web of Science)

1. Switch to Online Search Mode

2. Choose Web of Science

3. Submit Your Search Query

4. Select Reference

5. Copy Selection to Local Library

6. Switch back to Integrated Library and Online Search Mode

…et voilà

Collect Metadata – Endnote's Built-in Online Search

- EN's built-in Online Search is a handy tool to quickly get metadata, particularly for articles from the Web of Science Core Collection

- Other databases are readily accessible via EN's <Connection Files>

↪ Tip: Always switch to EN's <Online Search Mode> before starting an online search and manually transfer selected references to the local library

↪ Remember: In <Integrated Library & Search Mode> EN will automatically transfer all references (even unwanted ones) that subsequently would need to be deleted!

Collect Metadata – External Database Search & Import (Scopus)

Collect Metadata – External Database Search & Import (Scopus)

RIS-files can be automatically imported into the library via double-click

Note the temporary group <Imported References>

Or import the RIS-file manually via "File > Import > File" and the appropriate <Import Option>

↳ Tip: Other database specific import options/filters (eg Web of Science) can be found and activated via "Edit > Import Filters > Open Filter Manager"

Collect Metadata – External Search & Import (Google Scholar)

Google

Clifford Complexation of Constrained Ligands Piperazine   🔍

Scholar   About 292 results (**0.07** sec)

Complexation of **constrained ligands piperazine**, N-su
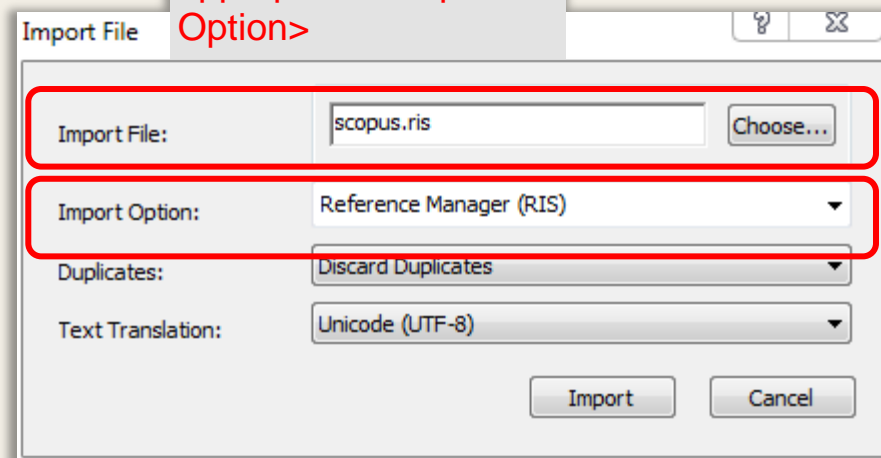**and thiomorpholine**
SE **Clifford**, V Tiwow, A Gendron, M Maeder... - Australian journal of ...,
Abstract **Complexation** of the symmetric cyclic diamine **piperazine** (1, 4-d
been examined in dry dimethyl formamide by spectrophotometric titrations
define formation constants, and by stopped-flow kinetics to define the ...
Cited by 2   Related articles   All 4 versions   Cite   Save   More

Cite   ×

Copy and paste a formatted citation or use one of the links to import into a bibliography
manager.

MLA   Clifford, Sarah E., et al. "Complexation of constrained ligands piperazine, N-
       substituted piperazines, and thiomorpholine." *Australian journal of chemistry*
       62.10 (2009): 1196-1206.

APA   Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance,
       G. A., ... & Schroeder, M. (2009). Complexation of constrained ligands
       piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of
       chemistry, 62*(10), 1196-1206.

Chicago Clifford, Sarah E., Vanny Tiwow, Aleasia Gendron, Marcel Maeder, Monica
        Rossignoli, Geoffrey A. Lawrance, Peter Turner, Alexander J. Blake, and Martin
        Schroeder. "Complexation of constrained ligands piperazine, N-substituted
        piperazines, and thiomorpholine." *Australian journal of chemistry* 62, no. 10
        (2009): 1196-1206.

                                    bTeX   EndNote   RefMan   RefWorks

Save As

▸ Neuhold, Bobby ▸ Downloads   ▼ ↻   Search Downloads

File name: scholar.enw

Save as type: EndNote Import File

Browse Folders   Save   Cance

ENW-files can be automatically imported
into EN's library via double-click

Collect Metadata – External Catalogue Search & Import (NEBIS)

Guest ☑ e-Shelf **Sign in**

New Search | NEBIS Libraries | Help | Other Catalogs | Language: English⌄

NEBIS

Schwarzenbach Environmental Orga ✕ | NEBIS network catalogue⌄ **Search** Advanced Search

All items ▾ | containing my search terms ▾ | anywhere ▾

Environmental organic chemistry
René P. Schwarzenbach, Chemist, Switzerland, 1945 -; Philip M. Gschwend;
Dieter M. Imboden, Physicist, Limnologist, Switzerland, 1943 -
2003

Locations & Request | **Details**

Title: Environmental organic chemistry
Additional Title Information: Rene P. Schwarzenbach, Philip M. Gschwend, Dieter M. Imboden
Place, Publisher: Hoboken, New Jersey : Wiley-Interscience
Creation Date: 2003
Edition: 2nd ed.

Actions⌄
Add to e-Shelf ☆
E-mail ✉
Print 🖨
Permalink 🔗
Citation ❝❞
EndNote Web ☆
Delicious ▪
Export RIS ☆

↶ Tip: Importing the RIS-file from NEBIS into Endnote swaps the order of author's first and last names

Export RIS-file and import via double-click

Collect Metadata – External Catalogue Search & Import (Publisher)

Springer Link

Search 🔍 ⚙

Springer Handbook of Mechanical Engineering
2009, pp 1149-1266

Construction Machinery

Eugeniusz Budny Prof., Mirosław Chłosta Dr., Henning Jürgen Meyer Prof.,
Mirosław J. Skibniewski Prof.

Look
Inside ›

⬇ **Download PDF** (5,540 KB)

👁 **View Printer Friendly Version**

Book chapter

Other actions

» Reprints and Permissions ↗
» Export citation
» About this Reference Work ↗
» Add to Papers ↗

Abstract

In this chapter the most common classes of machinery found on construction

Select Download ▼

» ProCite (RIS)
» Reference Manager (RIS)
» Ref Works (RIS)
» BookEnds (RIS)
» EndNote (RIS)
» PubMed (TXT)
» Text only (TXT)
» BibTeX (BIB)

Export Endnote-file and import via double-click

✎ Tip: Citations for book chapters are often best obtained via the publisher's website

Collect Metadata – Extract Metadata from PDFs

Double-check EN's PDF filename settings via Edit > Preferences > PDF Handling

EndNote Preferences

- Change Case
- Display Fields
- Display Fonts
- Duplicates
- Find Full Text
- Folder Locations
- Formatting
- Libraries
- **PDF Handling**
- Read / Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations

PDF Auto Renaming Options

- ○ Don't Rename
- ● Author + Year + Title
- ○ Author + Title
- ○ Author + Year
- ○ Title
- ○ Custom

Note: Filenames may be up to 50 characters long.

Existing PDF-files (incl. its metadata) can be imported via File > Import > File

Import File

Import File:	Esper_2002.pdf Choose...
Import Option:	PDF
Duplicates:	Discard Duplicates
Text Translation:	Unicode (UTF-8)

Import   Cancel

Reference   Preview   Esper-2002

Reference Type: Journal Article

Reference   Preview   Esper-2002   2 / 5

Author
Esper, J.
Cook, E. R.
Schweingruber, F

Year
2002

Title
Low-frequency si
tree-ring chronol
reconstructing pa
variability

Journal
Science

Volume
295

Issue
5563

Pages
2250-2253

REPORTS

Low-Frequency Signals in Long Tree-Ring Chronologies for Reconstructing Past Temperature Variability

Jan Esper,[1] Edward R. Cook,[2*] Fritz H. Schweingruber[1]

↳ Tip: PDF-file renaming can also be done later, even as a batch, via References > File Attachments > Rename PDFs

↳ Tip: DOI needs to be present to allow for the extraction of metadata from PDFs

Existing PDF annotations are kept during import

Collect Metadata – Manual Addition of references

References can be added manually and associated with a <Reference Type>

- For the manual addition of references you need to obey a certain syntax and rules regarding the input of the metadata into the respective fields

- Most of the rules are pretty straightforward and their effect (for a given output style) can be seen in the preview tab

- ↳ Tip: Compare your syntax with some already existing (imported) references of the same reference type
- ↳ Tip: EN's built-in Help index (F1) gives advice on entering references manually
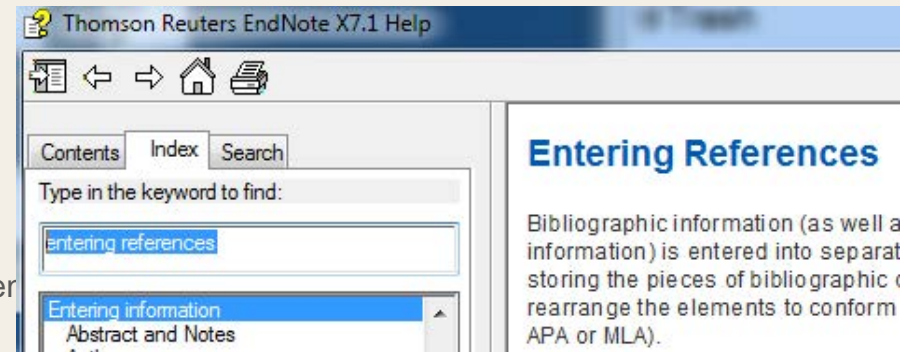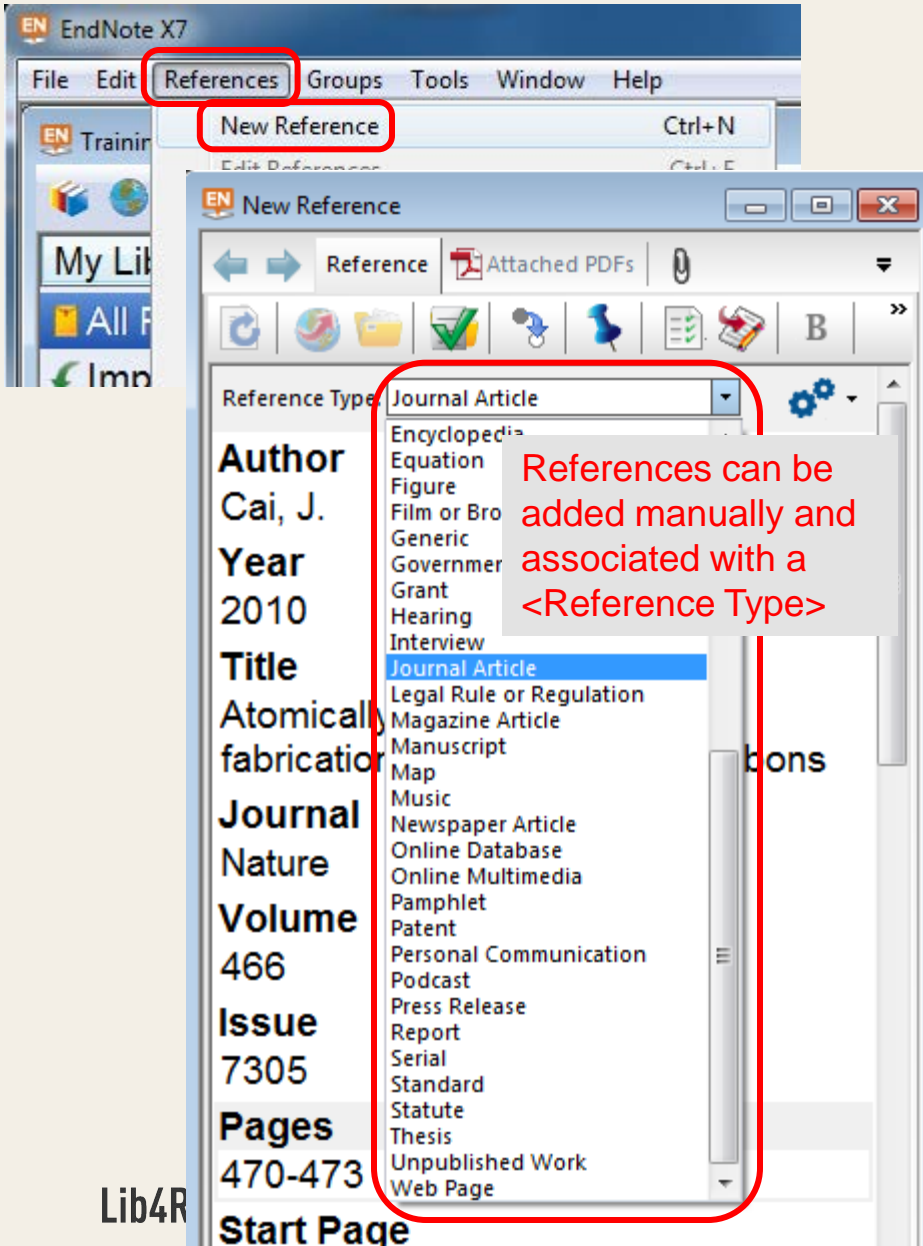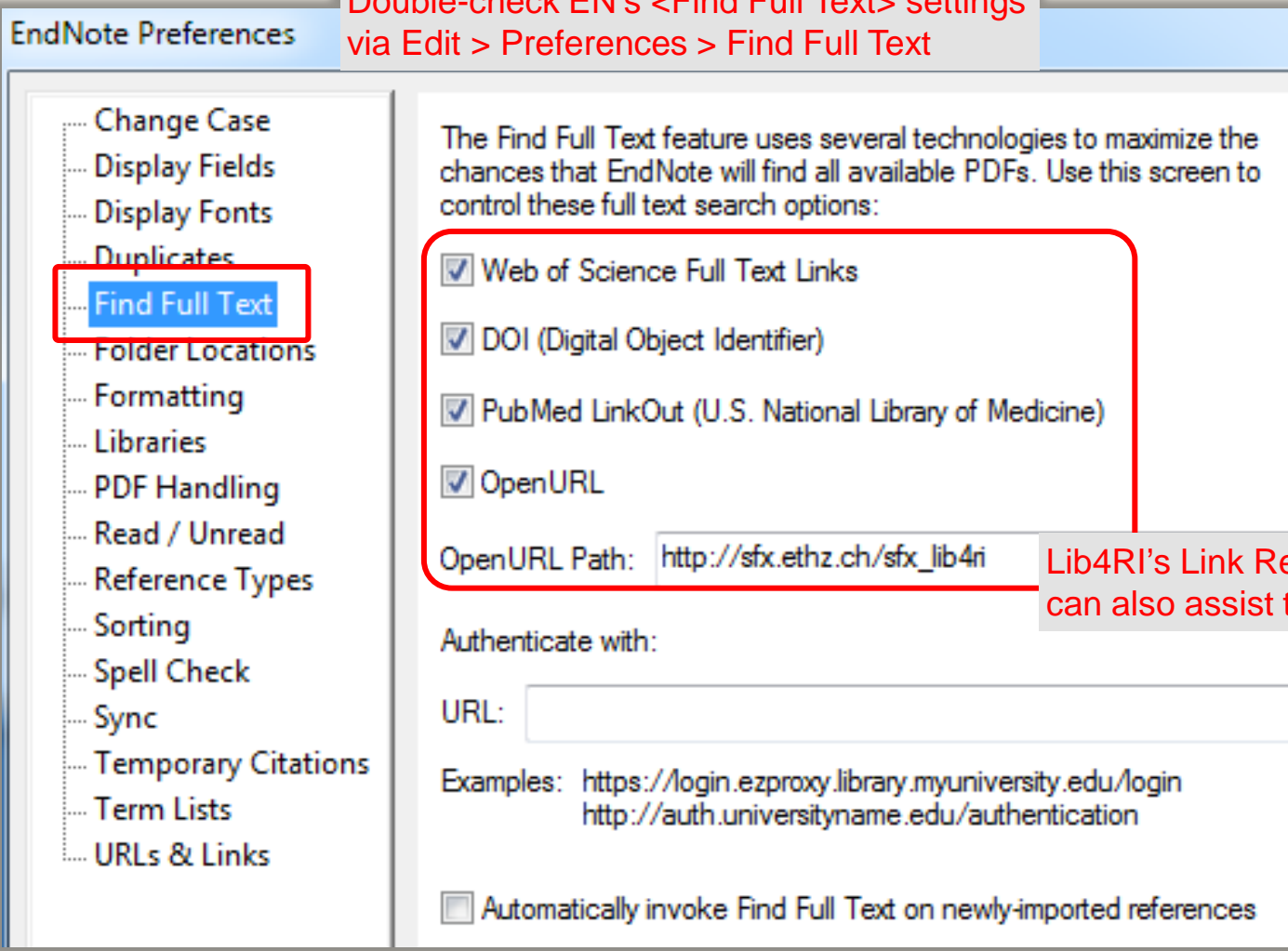
Collect Metadata – Manual Alteration / Editing of references

Metadata as imported eg via NEBIS connection

Edited metadata

EN Freedman, 2007 #1

Reference | Att

Title
Statistics
Place Published
New York
Publisher
W.W. Norton & Company
Number of Pages
576 S.

Freedman, 2007 #1

Reference | Att

Title
Statistics
Place Published
New York
Publisher
W.W. Norton & Company
Number of Pages
576

Layout ▾

Double-Click on the reference to be edited

Remove the unwanted German abbrev. "S." for pages

(Bern) Freihandbereich
Keywords
Intuitive Book
Basic Statistics
Mathematical statistics
Statistik
Lehrbuch

Freihandbereich
Keywords
Mathematical statistics
Statistik
Lehrbuch

You might want to add your own keywords

↳ Tip: Always check imported metadata for correctness & suitable field syntax.

Find & Attach Fulltext PDFs

Double-check EN's <Find Full Text> settings via Edit > Preferences > Find Full Text

EndNote Preferences

- Change Case
- Display Fields
- Display Fonts
- Duplicates
- **Find Full Text**
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read / Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations
- Term Lists
- URLs & Links

The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options:

- ☑ Web of Science Full Text Links
- ☑ DOI (Digital Object Identifier)
- ☑ PubMed LinkOut (U.S. National Library of Medicine)
- ☑ OpenURL

OpenURL Path: http://sfx.ethz.ch/sfx_lib4ri

Lib4RI's Link Resolver can also assist to find full text

Authenticate with:

URL:

Examples: https://login.ezproxy.library.myuniversity.edu/login
http://auth.universityname.edu/authentication

☐ Automatically invoke Find Full Text on newly-imported references

Find & Attach Fulltext PDFs – EN's <Find Full Text> Function

Often, Endnote finds & attaches (licensed) full text PDFs for your selection of references

↬ Tip: Use EN's PDF file auto-renaming (see Edit > Preferences > PDF Handling)

↬ Tip: You can find the PDFs in the folder *.DATA \ PDF

Automatic

…be patient, finding & downloading might take a little while

The fields <File Attachments> & URL are populated accordingly

Check the group <Found PDF> for successfully attached full texts

Find & Attach Fulltext PDFs – Guided via Lib4RI's Link Resolver

Link Resolver

Training Library.enl

Chicago 16th Author-Date

My Library

All References (11)

Sync St...

Unfiled

Trash

My Groups

More Group

Find Full Text

Found PDF (7)

Not found (3)

		Author	Year
		Clifford, Sarah ...	2009
		Freedman, David...	2007
		...ch, ...	2003

Right Click a reference and goto URL > OpenURL Link

Find Full Text

Find Reference Updates...

URL ▶ OpenURL Link

Figure ▶ Open URL

For those <Not Found>, Lib4RI's link resolver may provide help to get to the full text

Showing 3 of 3 references in Group. (All References: 11)

Lib4RI

Title: Complexation of constrained ligands piperazine, N-substituted pipera thiomorpholine

Source: Australian journal of chemistry [0004-9425] Clifford yr:2009 vol:62 i pg:1196 -1206

Full text

This title is not subscribed or the volume is not part of the licensing period. Please order a copy via NEBIS or via our Document Delivery Service below.

Further options to get it

Google Scholar - Search with the Article Title

NEBIS - Check availability in the library catalogue to order a copy

Document De...

Eg, file a NEBIS copy request to get a PDF-scan of the article as it is not part of our licensing

...or search for the PDF yourself...

how Search Panel

| | Reference | Preview | Clifford-20 | |

Issue
10

Pages
1196-1206

ISSN
1445-0038

File Attachments

Clifford-20...
of constrai...

Clifford-20...
of constrai...

...and for manual attachment, drag'n drop the PDF into the reference tab pane of the corresponding reference

...

Introduction to Endnote X7

- ✋ **EN's GUI**
  - Create a new library
  - Graphical User Interface
- ✋ **Collect**
  - Create a new library
  - Graphical User Interface
  - Endnote's built-in online search
  - Export / import after an external database search
  - Import metadata from PDFs
  - Manually adding & altering references
  - Find & attach full text PDFs
- ✋ **Organise**
  - Building groups
  - Checking & Updating references
  - Finding duplicates
  - Searching references (incl. PDFs & annotations)
  - Backing up your library

- ✋ **Cite**
  - Bibliographic output styles
  - Cite-while-you-write (MS Word)
  - Using journal abbreviations
- ✋ **Share & Sync**
  - Without EN Online Account
    - Share references via E-mail
    - Share travel library via Word plugin
    - Share library as a compressed library or via servers
  - With EN Online Account
    - Sync between your devices
    - Share entire library (EN X7.2 only)
    - Share groups (EN Online only)
- ✋ **Concluding Info, Help & Useful Links**
  - Endnote can do more
  - Is Endnote the right thing for me
  - User Guides & Tutorials
  - Support, Forum, FAQ, Blogs, Community, …

Organising your Library – Grouping References

…or have references filed into smart groups automatically

…or create a whole new group set with new groups therein

Create groups and drag'n drop <Unfiled> references in there
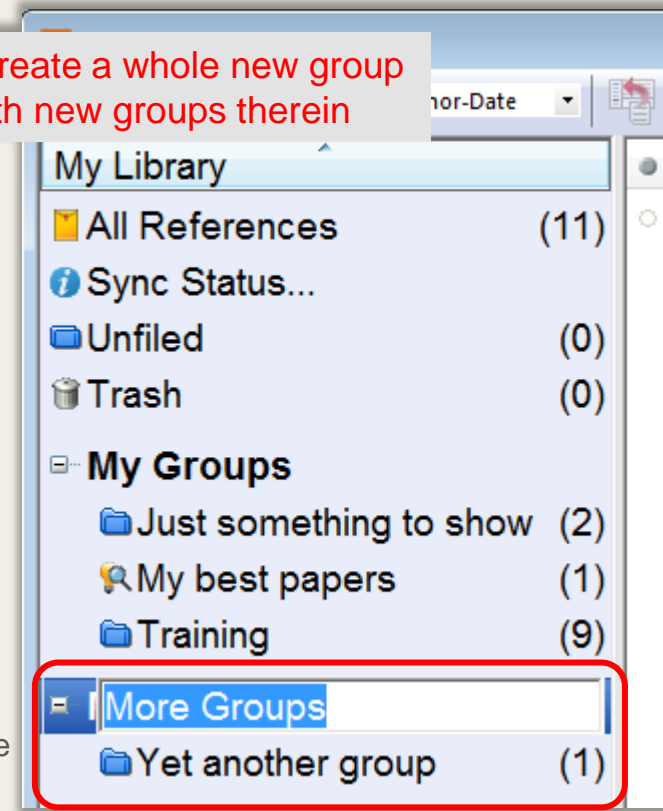
↳ Tip: Work with one library only and rather assign references to groups suiting your different purposes (eg your different papers, theses, …

↳ Tip: One reference can be a member of multiple groups (no duplicates are created)

Organising your Library – Checking & Updating References

Highlight one or more references in your library and try to find available updates via References > Find Reference Updates

Check references for "obvious" typos or issues, eg, NEBIS often exports into the field for <page numbers> the German abbreviation "S." for pages

↳ Tip: If you don't want to update all or empty fields only, you can also just copy / paste individual fields. Don't forget to save your updates.

↳ This tool is particularly handy for updating manually & incomplete input references

Organising your Library – Finding Duplicates

Via Edit > Preferences, set the criteria to detect duplicates

EndNote Preferences

- Change Case
- Display Fields
- Display Fonts
- Duplicates
- Find Full Text
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read / Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations
- Term Lists
- URLs & Links

Compare references based on the following fields:

- ☑ Author
- ☑ Year
- ☑ Title
- ☐ Secondary Title (Journal)
- ☐ Volume
- ☐ Issue
- ☐ Pages

Criteria
- ○ Exact Match
- ● Ignore spacing and punctuation

Online Search Results
- ☐ Automatically discard duplicates

↳ Tip: Endnote assigns unique and increasing record numbers (below, #9 and #31) to all references. This can become handy to quickly identify a "later" duplicate from an "early" original without having to double-check all fields.

For all found duplicates, decide which record to keep

Find Duplicates

Comparing 1 and 2 of 2 duplicates.
Select the record to keep. The record not selected will be moved to the Trash. Select Skip to go to the next set of duplicates.

Skip   Cancel

Keep This Record

Neyens, 2003 #9
Ref Type: Journal Article

Keep This Record

Neyens, 2003 #31
Ref Type: Journal Article

Author
Neyens, E.
Baeyens, J.

Year
2003

Title
A review of classic Fenton's peroxidation as an advanced oxidation technique

Journal
Journal of Hazardous Materials

Volume
98

Author
Neyens, E.
Baeyens, J.

Year
2003

Title
A review of classic Fenton's peroxidation as an advanced oxidation technique

Journal
Journal of Hazardous Materials

Volume
98

Organising your Library – Searching Your Library

The advanced search box allows to search for Boolean combinations of various fields, such as author, year, title, keywords, etc

Quick Search is often sufficient. Phrase search (" ") and wildcards (*) can be used. PDFs are searched as well!

Tip: Imported references often have the fields <Keywords> already populated. You might even consider adding your own keywords to references as they are all searchable.

Organising your Library – Backup

Archive the whole library or just groups or group sets, incl. attachments into one file
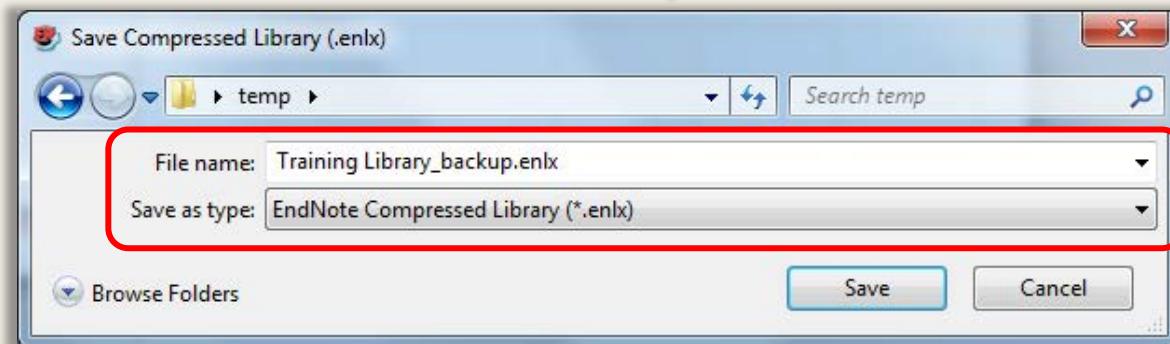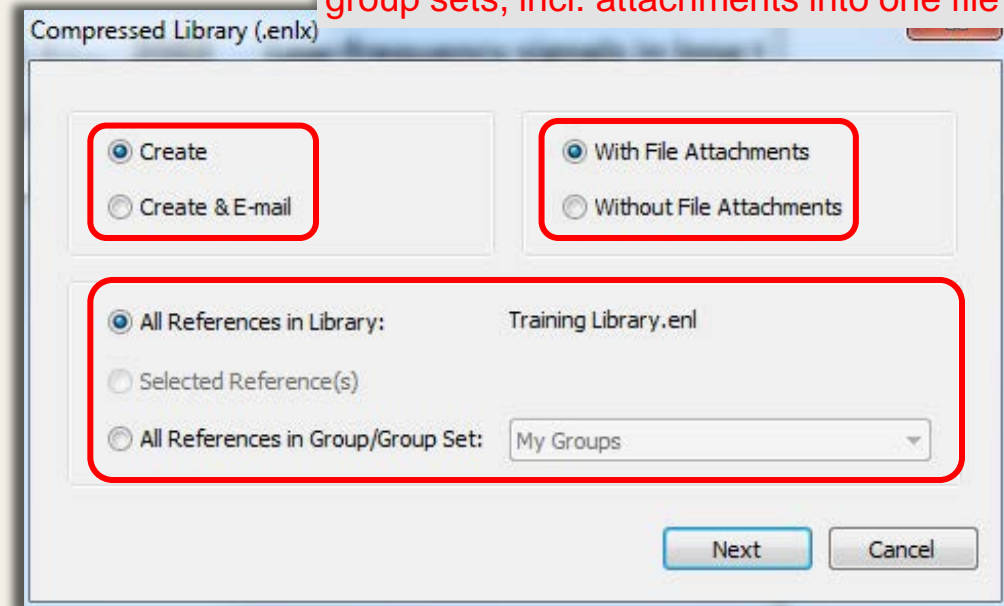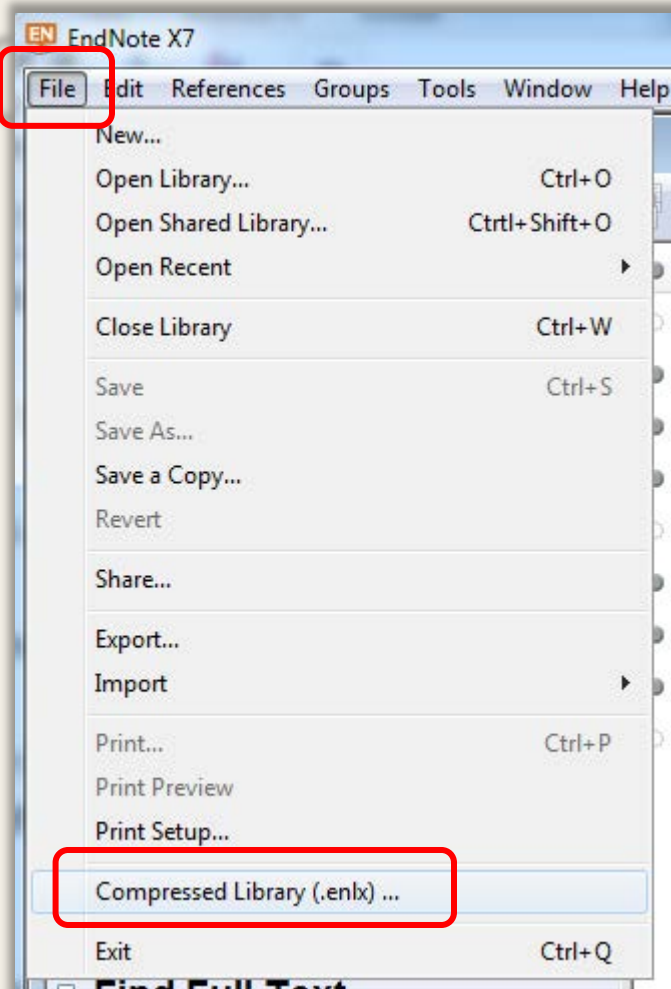
Tip: When compressed ENLX-files are re-opened, EN regenerates the original *.ENL file and *.DATA folder

Introduction to Endnote X7

- ⮌ EN's GUI
  - Create a new library
  - Graphical User Interface

- ⮌ Collect
  - Create a new library
  - Graphical User Interface
  - Endnote's built-in online search
  - Export / import after an external database search
  - Import metadata from PDFs
  - Manually adding & altering references
  - Find & attach full text PDFs

- ⮌ Organise
  - Building groups
  - Checking & Updating references
  - Finding duplicates
  - Searching references (incl. PDFs & annotations)
  - Backing up your library

- ⮌ Cite
  - Bibliographic output styles
  - Cite-while-you-write (MS Word)
  - Using journal abbreviations

- ⮌ Share & Sync
  - Without EN Online Account
    - Share references via E-mail
    - Share travel library via Word plugin
    - Share library as a compressed library or via servers
  - With EN Online Account
    - Sync between your devices
    - Share entire library (EN X7.2 only)
    - Share groups (EN Online only)

- ⮌ Concluding Info, Help & Useful Links
  - Endnote can do more
  - Is Endnote the right thing for me
  - User Guides & Tutorials
  - Support, Forum, FAQ, Blogs, Community, …

Cite – Bibliographic Output Styles

- Output styles determine how references will be formatted and displayed in your bibliography or in your text document

- EN's <Style Manager> provides > 5000 styles (incl. demands for most journals)

Via EN's Style Manger (Edit > Output Styles > Style Manager) you can
- Select favourite styles & preview
- Get more styles
- Edit Styles

Select your favourite styles so they will be accessible EN's main menu

EndNote Styles

Name	Category
☐ Harmful Algae	Biology
☐ Harvard	Science
☑ Harvard (NUIG)	Science
☐ Harvard Intl J Press-Politics	Political Science

Get More on the Web... Mark All Unmark All Find by ▶

Less Info: Style Info/Preview Edit

Billoski, T. V. (1992) *Introduction to Paleontology*, 6th ed., New York: Institutional Press.

Morehouse, S. I. and Tung, R. S. (1993) Statistical evidence for early extinction of reptiles due to the K/T event. *Journal of Paleontology*, 17(2), pp. 198-209.

Schwartz, M. T. and Billoski, T. V. (1990) Greenhouse hypothesis: effect on dinosaur extinction. in Jones, B. T. and Lovecraft, N. V., (eds.) *Extinction*, New York: Barnes and Ellis. pp. 175-189.

Preview

Cite – Bibliographic Output Styles

- With EN's <Style Editor> you can make many style adjustments effecting layout & formatting of all <reference types> (eg book, journal article, etc)

↳ Tip: EN's style editor is very powerful and can require a fair bit of training to get used to the rules and special characters that effect the formatting of your citations/bibliography.

↳ Tip: If you want to create/alter a style

    ↳ Using EN's style manager, find & select the one closest to your liking and open it with EN's style editor

    ↳ Save the style under a different name and tag it in the style manager as a favourite

    ↳ Select the style in EN's main menu

    ↳ Make changes to the style according to EN's help (F1) and observe the effects for a selected reference in the preview pane of EN's main window (after saving)

Cite – Bibliographic Output Styles

Small changes such as the display of page number are rather straightforward.

Cite – Bibliographic Output Styles

Others, such as the addition of the field <DOI> to the reference type <Journal Articles>, require a bit more knowhow (F1).

Cite – Create a Quick Bibliography

Using the current output style a bibliography with the selected references can be put into the clipboard via right-click > Copy Formatted, …
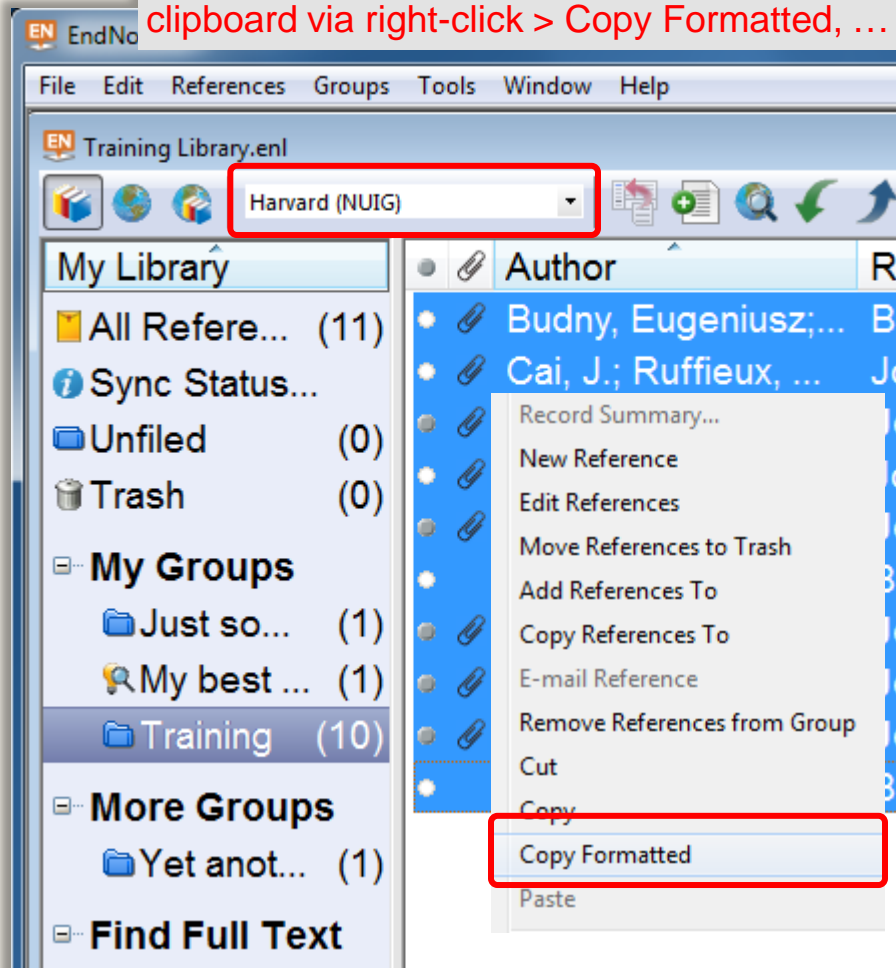
…and can then be pasted with its formatting into a text document.

Cite-While-You-Write (MS Word Plugin)

EN installs the tab <Endnote X7> into the MS Word menu

- EN's Word plugin acts as an interface between EN and MS Word
- Either use <Insert Citation> from within the Word document or drag'n drop selected citation(s) from EN to the desired position in the document
- By default, EN activates <Instant Formatting>, ie citations and bibliography are automatically formatted (or updated every 30sec) according to the selected <Style>

↳ Tip: Particularly if the document is becomes rather large it is better to use the unformatted citations (via <Convert Citations and Bibliography) and turn of <Instant Formatting> during the writing process.

Cite-While-You-Write (MS Word)

Select the wanted <Style>, then
<Update Citations & Bibliography>

Drag'n drop selected references from Endnote
to the desired positions in the document

EN creates a new group incl. the
references associated with the docx-file

Cite-While-You-Write (MS Word)

Eg The style <Science> required minor adjustments in the reference type <Journal Article>

Cite-While-You-Write (MS Word)

Tip: Use <Edit & Manage Citations> of EN's Word plugin to delete individual citations, to quickly adjust the output for one or more citation, and more.
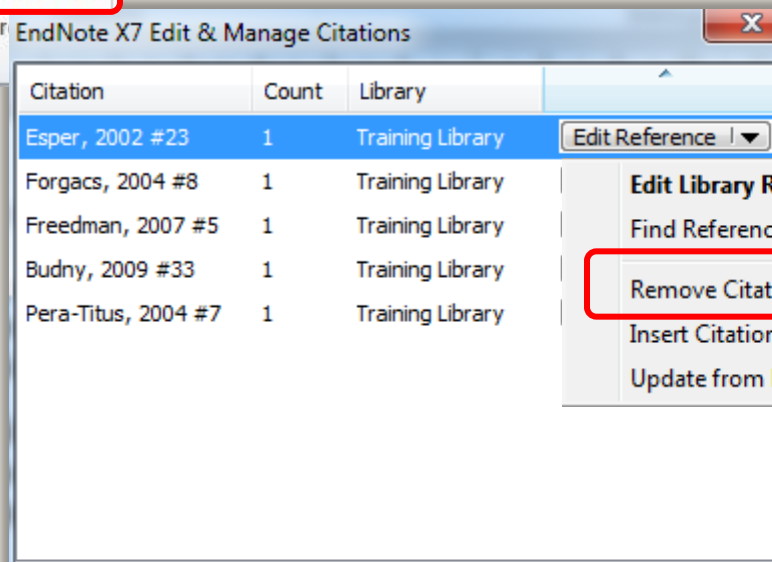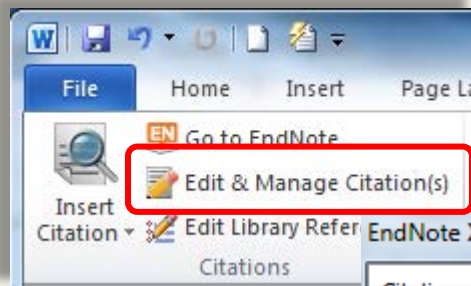
…preferably use this to remove a citation from the document
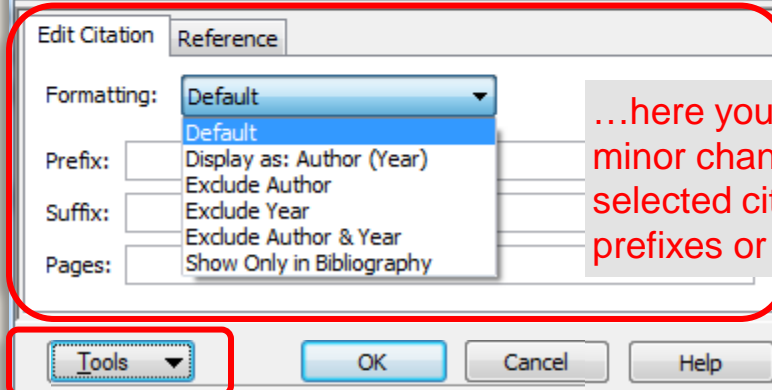
…here you can introduce minor changes to the selected citations incl. prefixes or suffixes

…here you can alter eg font, indent, line spacing etc of your bibliography
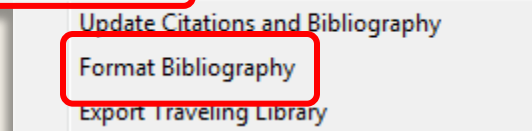
Cite – Using Journal Abbreviations

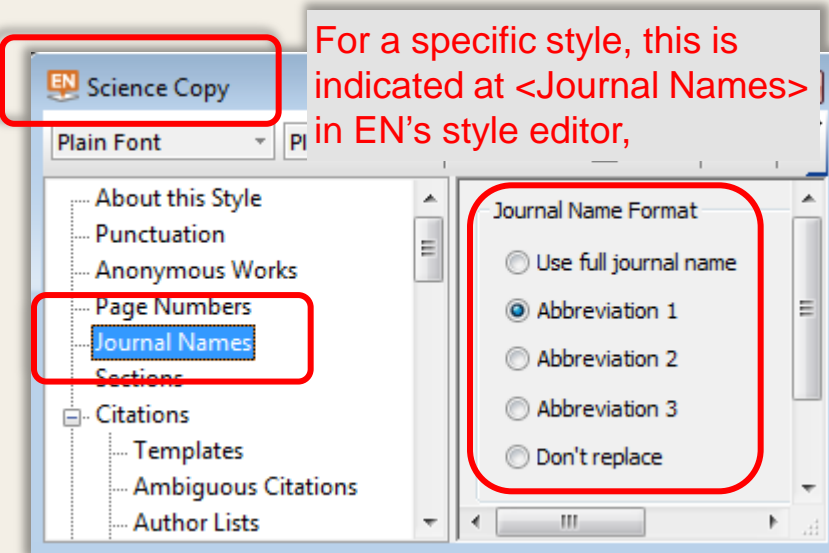- Some journals require the journal title to be abbreviated in the bibliography

For a specific style, this is indicated at <Journal Names> in EN's style editor,

- The full title and up to 3 abbreviations for journals can be defined in a so called journal <Term List>

- Endnote

  a) by default, copies the content of the reference field <Alternate Journal> as <Abbreviation 1> into a linked journal <term list>.

  b) allows the import of built-in journal <term lists> (ASCII files)

  c) allows to generate your own user defined journal <term list> (ASCII file)

- Method a) is the most straight forward one
  Method b) is particularly useful to save time with large amounts of citations
  Method c) might require lots of manual editing

Cite – Using Journal Abbreviations (Method a)

This is what your journal term list might look like (Tools > Open Term Lists > Journal Term List)
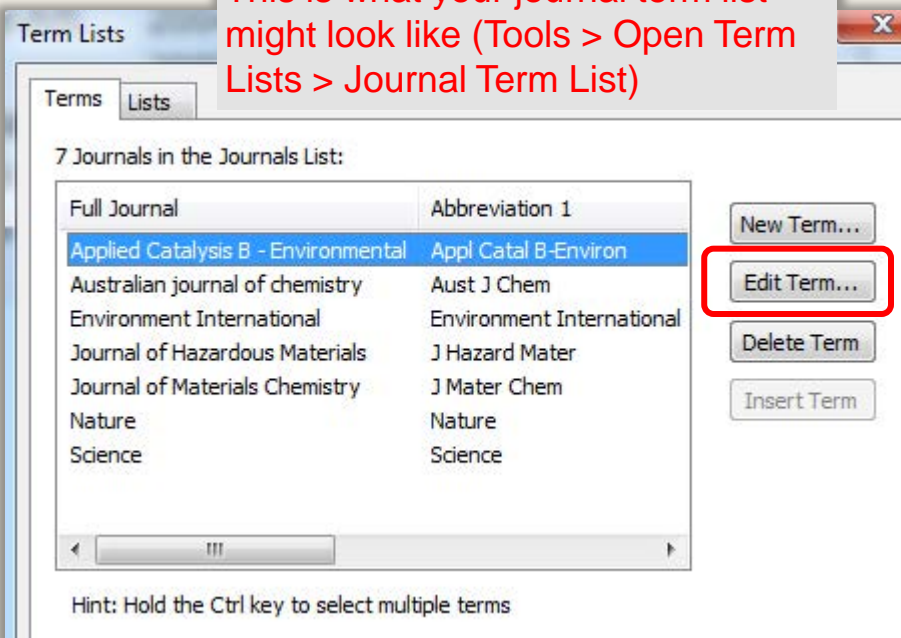
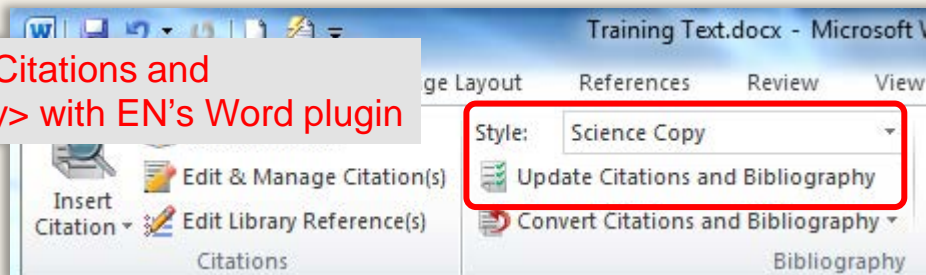…and this after editing the abbreviations
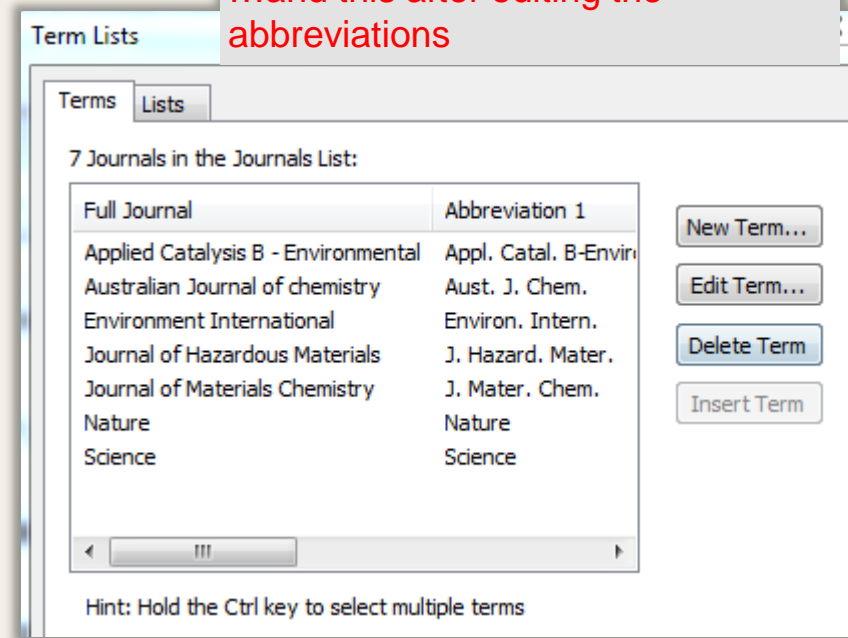
↪ Tip: If you are having troubles finding 'correct' abbreviations see http://www.lib4ri.ch/resources/journals.html#catalogues

↪ Tip: Save your journal term list (*.txt) for future use, expansion or simply as a backup

Cite – Using Journal Abbreviations

…Update <Citations and Bibliography> with EN's Word plugin

…and observe the effect on the bibliography

Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* **295**, 2250-2253 (2002). doi: 10.1126/science.1066208

2. E. Forgacs, T. Cserháti, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environ. Intern.* **30**, 953-971 (2004). doi: 10.1016/j.envint.2004.02.001

3. D. A. Freedman, R. Pisani, R. Purves, *Statistics.* (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.

4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering,* K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.

5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Appl. Catal. B-Environ.* **47**, 219-256 (2004). doi: 10.1016/j.apcatb.2003.09.010

Introduction to Endnote X7

- **EN's GUI**
  - Create a new library
  - Graphical User Interface

- **Collect**
  - Create a new library
  - Graphical User Interface
  - Endnote's built-in online search
  - Export / import after an external database search
  - Import metadata from PDFs
  - Manually adding & altering references
  - Find & attach full text PDFs

- **Organise**
  - Building groups
  - Checking & Updating references
  - Finding duplicates
  - Searching references (incl. PDFs & annotations)
  - Backing up your library

- **Cite**
  - Bibliographic output styles
  - Cite-while-you-write (MS Word)
  - Using journal abbreviations

- **Share & Sync**
  - Without EN Online Account
    - Share references via E-mail
    - Share travel library via Word plugin
    - Share library as a compressed library or via servers
  - With EN Online Account
    - Sync between your devices
    - Share entire library (EN X7.2 only)
    - Share groups (EN Online only)

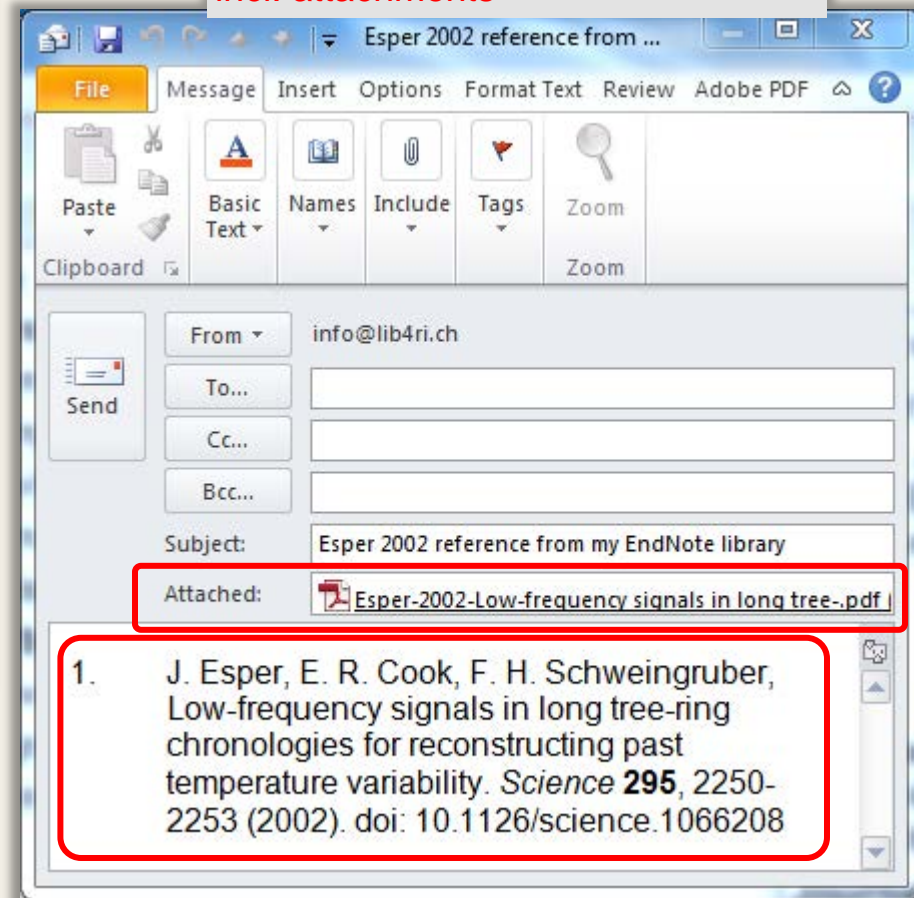- **Concluding Info, Help & Useful Links**
  - Endnote can do more
  - Is Endnote the right thing for me
  - User Guides & Tutorials
  - Support, Forum, FAQ, Blogs, Community, …

Sharing without an EN Online Account
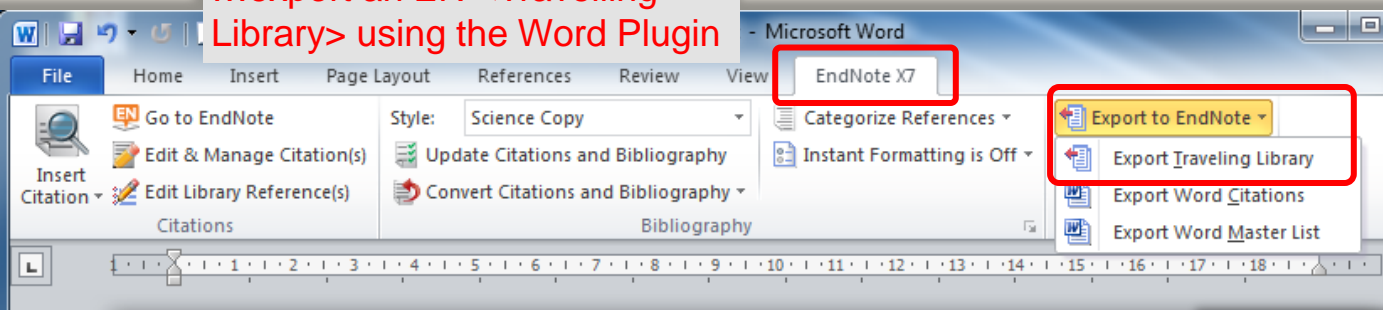

…via e-mail (one reference at a time)
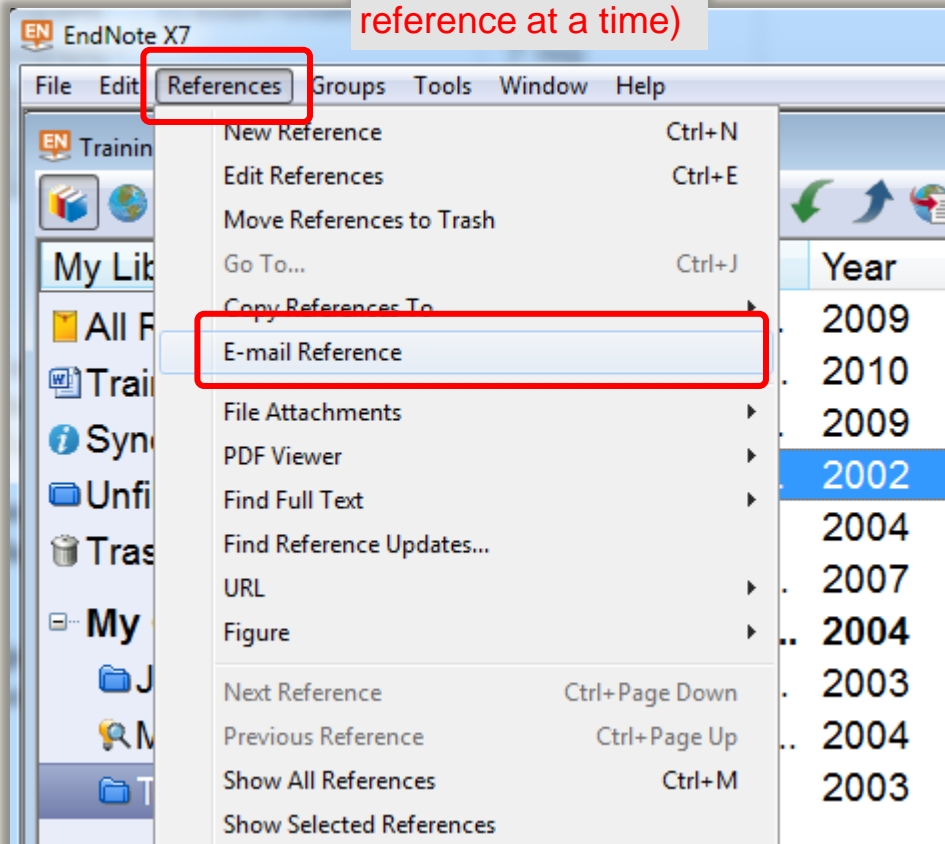
… formatted according to your style, incl. attachments

Sharing without an EN Online Account

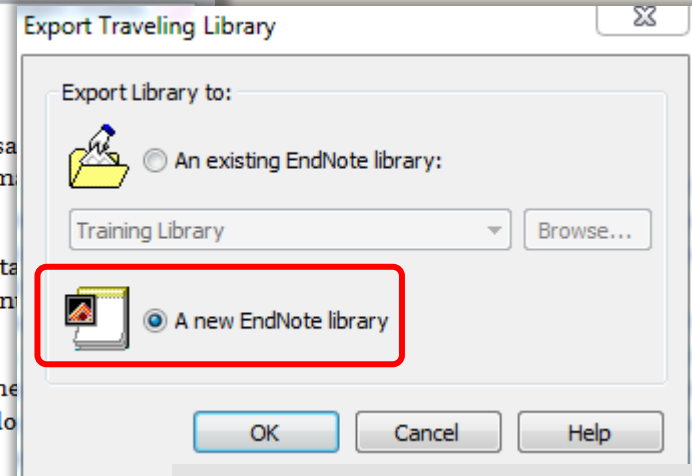…export an EN <Travelling Library> using the Word Plugin

…an EN library is created from the citations in the Word document (no attachments)

Sharing without an EN Online Account

✎ **Share your library (or groups thereof) by using EN's compress library feature**
  - The entire library or just groups incl. attachments can be compressed in one single file (refer to backup)

✎ **Share your library via an institutional server**
  - Put your library on a shared server
  - One person at a time has full access
  - Note that this can corrupt your library if the server has an outage

✎ **Don't share and sync your library via Dropbox and other Cloud services**
  - Endnote behaves like a time bomb and your library will eventually become corrupted. This is NOT recommended by Endnote at all!

✎ **Should your library get corrupted**
  - Endnote offers a repair tool with limited capabilities via Tools > Recover Library

Share & Sync Using an EN Online Account

Sign up for Endnote Online at www.myendnoteweb.com

Open your EN X7 library and enter your details at Edit > Preferences > Sync

ENDNOTE®

Sign In or **create an account**

E-mail:

Password:

Login

☐ Keep me signed in

EndNote Preferences

Change Case
Display Fields
Display Fonts
Duplicates
Find Full Text
Folder Locations
Formatting
Libraries
PDF Handling
Read / Unread
Reference Types
Sorting
Spell Check
Sync
Temporary Citations
Term Lists
URLs & Links

Synchronize your data with your EndNote account. Learn more

Upgrade or create your two-year EndNote account to get the latest features and enable Sync.

Enable Sync

EndNote Account Credentials

E-mail Address: info@lib4ri.ch

Password: •••••••••••••

Sync this EndNote Library

\\lib4ri\work$\Proje...\Training Library.enl

☐ Sync Automatically
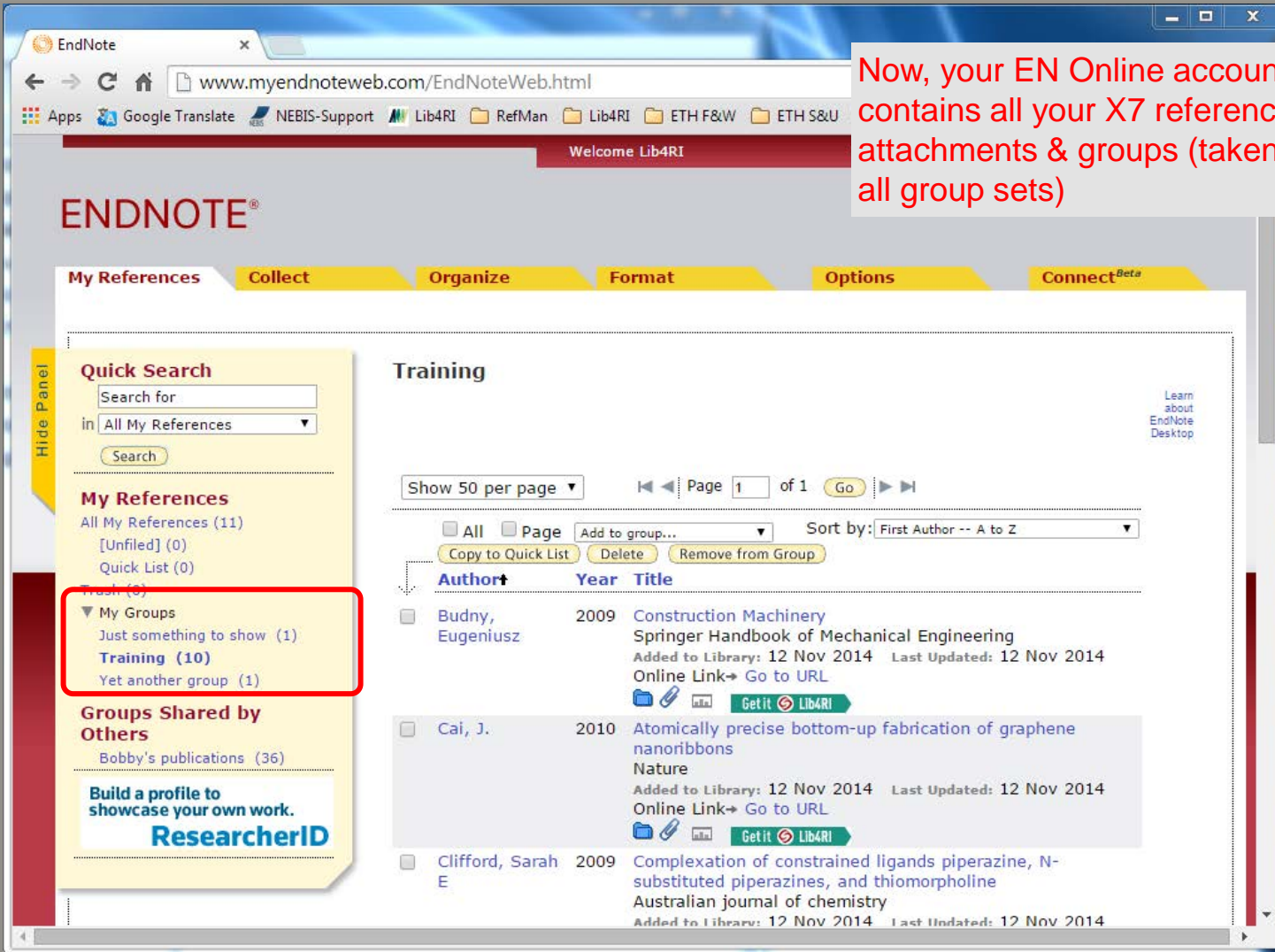
EndNote Defaults   Revert Pan

If you always work with one and the same library, you can activate <Sync Automatically>, or else manually sync via Tools > Sync

- ↳ Tip: Important - Backup your library prior to enabling Sync
- ↳ Tip: Important - Should you have an account with Thomson Reuters (alerts with Web of Science, Researcher ID, etc), use your existing credentials to sign into Endnote Online
- ↳ Tip: Only one single library can be synced (no smart groups)
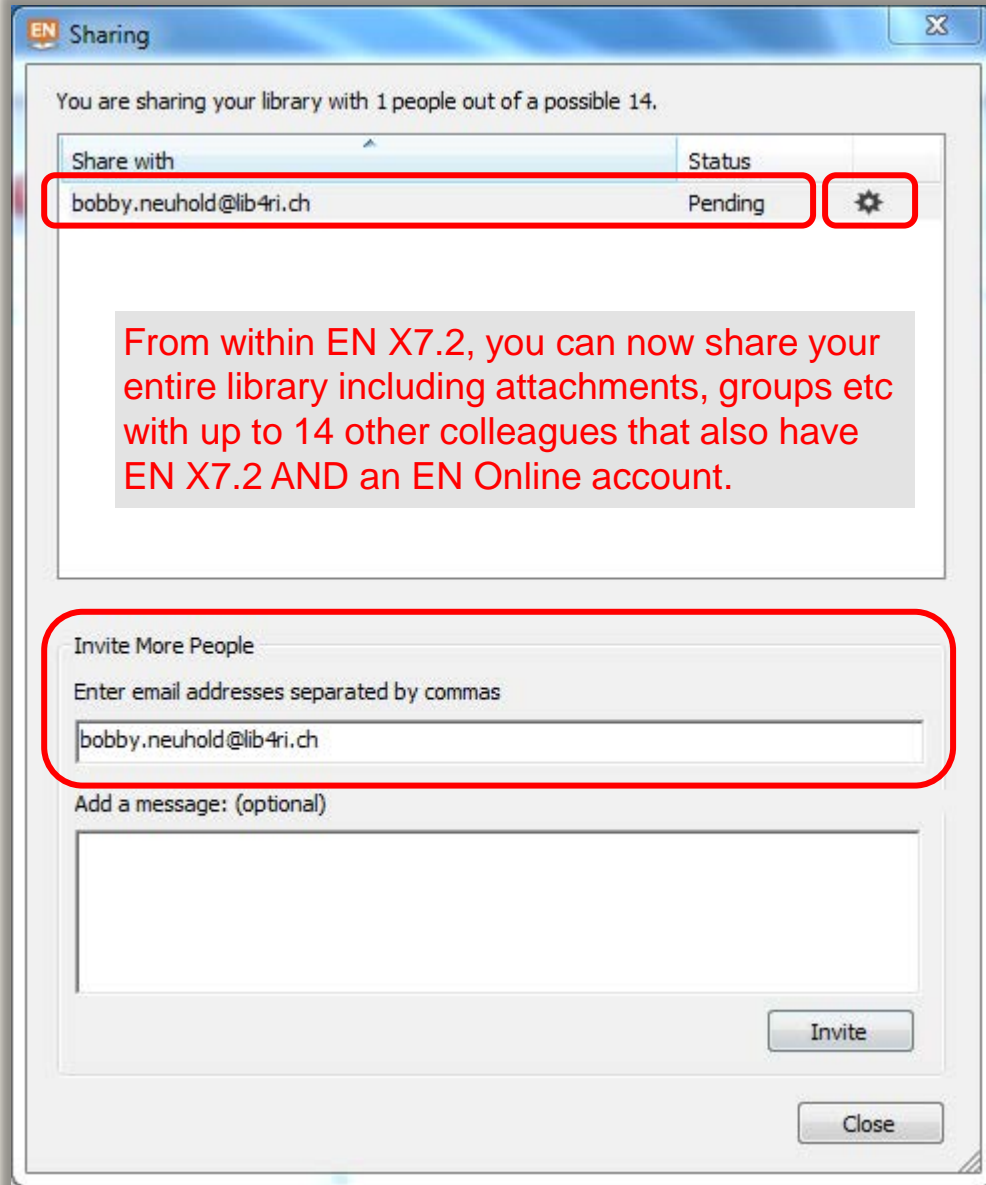
Share & Sync Using an EN Online Account

Now, your EN Online account contains all your X7 references, attachments & groups (taken from all group sets)
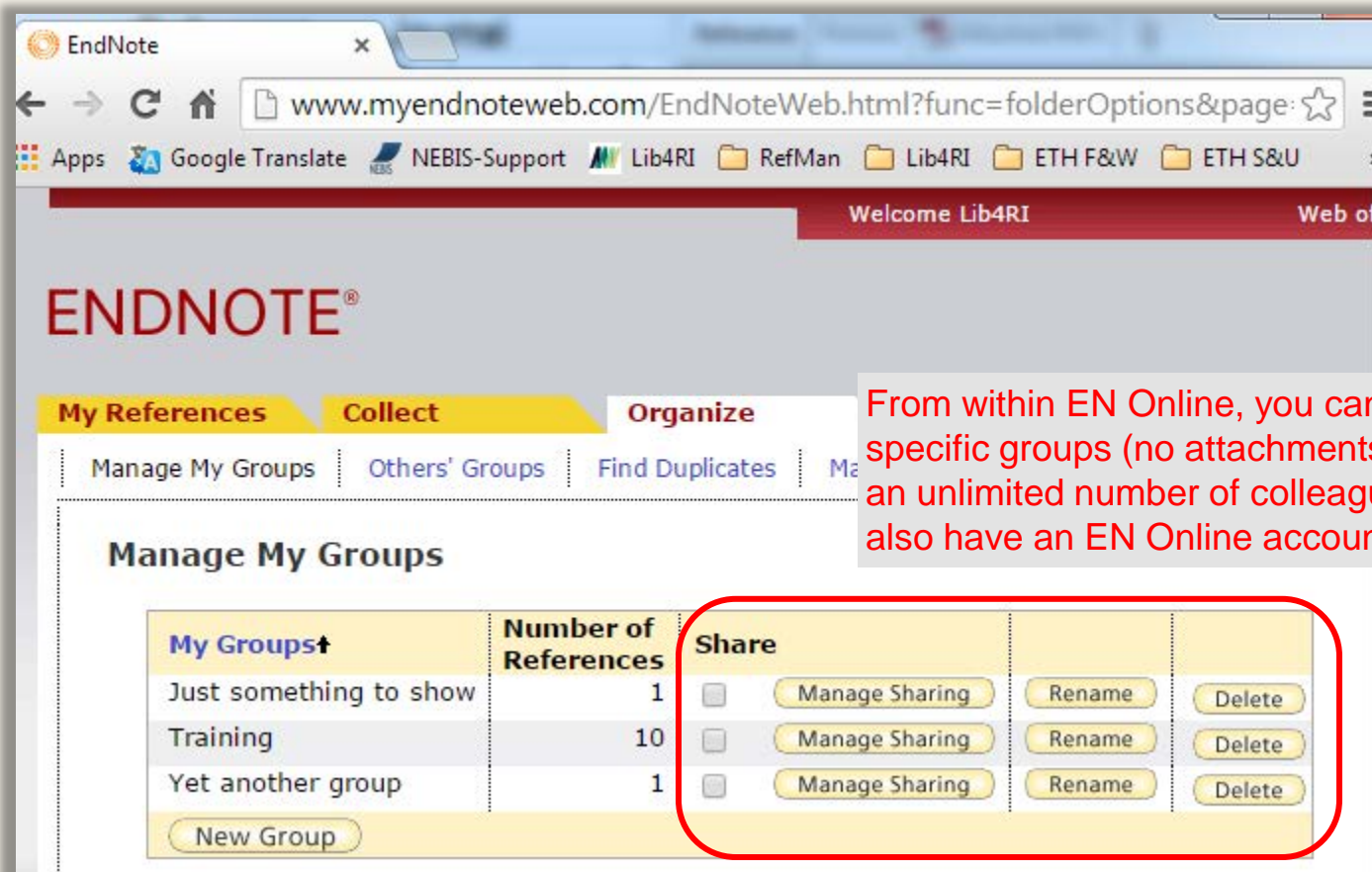
↪ Tip: If you like to sync this library with another device (PC, Mac or iPad), create a new library on that device, then enable and start syncing therein (max 3 for one account)

Share & Sync Using an EN Online Account

Sharing

You are sharing your library with 1 people out of a possible 14.

Share with ▲	Status	
bobby.neuhold@lib4ri.ch	Pending	✿

From within EN X7.2, you can now share your entire library including attachments, groups etc with up to 14 other colleagues that also have EN X7.2 AND an EN Online account.

Invite More People

Enter email addresses separated by commas

bobby.neuhold@lib4ri.ch

Add a message: (optional)

[Invite]

[Close]

↪ Tip: After the invitee accepts your invitation (via e-mail) his sharing status <Pending> changes to <Member>; you can revoke the membership at any time via ✿

↪ Tip: From within EN X7.2, the new member now has full access to your library via File > Open Shared Library. Note that all his changes will effect your (shared) library as well.

Share & Sync Using an EN Online Account

From within EN Online, you can share specific groups (no attachments) with an unlimited number of colleagues that also have an EN Online account.

↳ Tip: Groups shared via EN Online are only accessible via EN Online (but can be exported to X7)

↳ Tip: Endnote Online is a fully functional Reference Manager with limited functionality, particularly without a full EN X7 licence. Check Useful Links (below) to find more info on EN Online.

Introduction to Endnote X7

- **EN's GUI**
  - Create a new library
  - Graphical User Interface

- **Collect**
  - Create a new library
  - Graphical User Interface
  - Endnote's built-in online search
  - Export / import after an external database search
  - Import metadata from PDFs
  - Manually adding & altering references
  - Find & attach full text PDFs

- **Organise**
  - Building groups
  - Checking & Updating references
  - Finding duplicates
  - Searching references (incl. PDFs & annotations)
  - Backing up your library

- **Cite**
  - Bibliographic output styles
  - Cite-while-you-write (MS Word)
  - Using journal abbreviations

- **Share & Sync**
  - Without EN Online Account
    - Share references via E-mail
    - Share travel library via Word plugin
    - Share library as a compressed library or via servers
  - With EN Online Account
    - Sync between your devices
    - Share entire library (EN X7.2 only)
    - Share groups (EN Online only)

- **Concluding Info, Help & Useful Links**
  - Endnote can do more
  - Is Endnote the right thing for me
  - User Guides & Tutorials
  - Support, Forum, FAQ, Blogs, Community, …

Endnote can do more…

- Categorise bibliographies (eg for CVs)
- Cite within Powerpoint (plugin)
- Footnotes
- Built-in Word manuscript templates (for various journals)
- Handle figures and tables (for referencing in Word)
- Repair broken libraries
- …

Be explorative

…but never without a backup

Is Endnote the right thing for me?

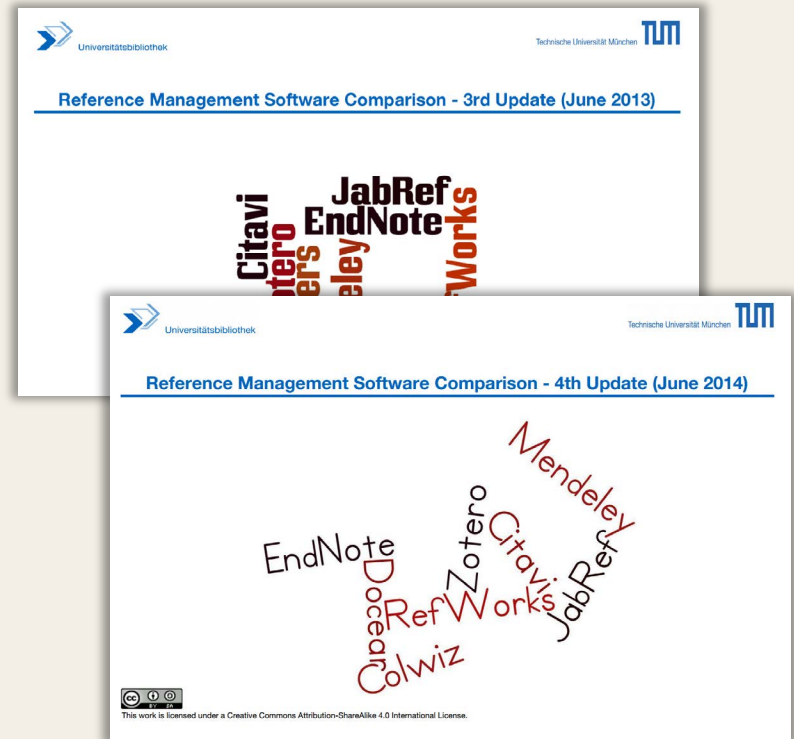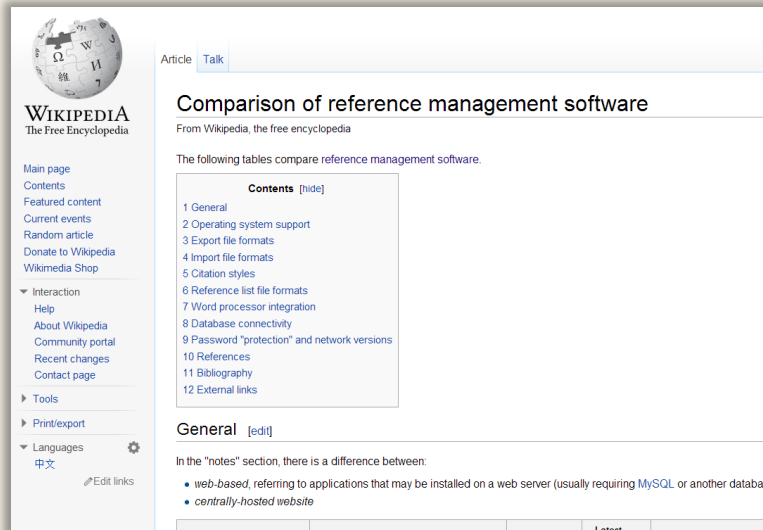↪ A quick comparison sheet (Endnote, Mendeley, Zotero) is in your documentation

Is Endnote the right thing for me?

Reference Management Software Comparison - 3rd Update (June 2013)

Reference Management Software Comparison - 4th Update (June 2014)

> ⚒ **Comprehensive comparisons**
>
> - Wikipedia > Comparison of reference management software
>
> - Digital Collection Management TU Munich
>   http://mediatum.ub.tum.de/node?id=1231325 (2014)
>   http://mediatum.ub.tum.de/node?id=1127557 (2013)

➡ Talk to colleagues. Which software do they use and why !

Help, User Guides & Tutorials

☙ ## Via Endnote Help you have access to

- the built-in Endnote help, "F1"
  (PDF located in program folder)

- online training resources (tutorials,
  online user manual, webinars)

- technical support, knowledge base,
  community, programs updates,
  more styles, …

- Also via www.endnote.com
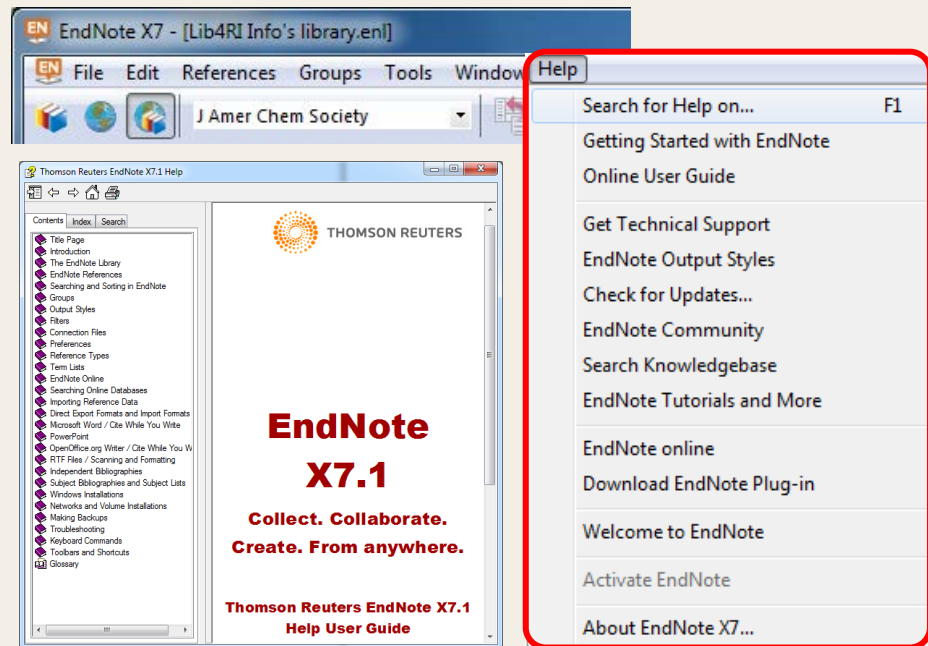
☙ ## Adept Scientific's Endnote portal offers

- more training material incl. product
  manuals, quick reference & how to
  guides, case studies, …

- links to the 30 day trial software

- note that some resources require a
  one-off email registration

- visit www.adeptscience.co.uk and
  navigate e.g. to > Support >
  Downloads > Endnote
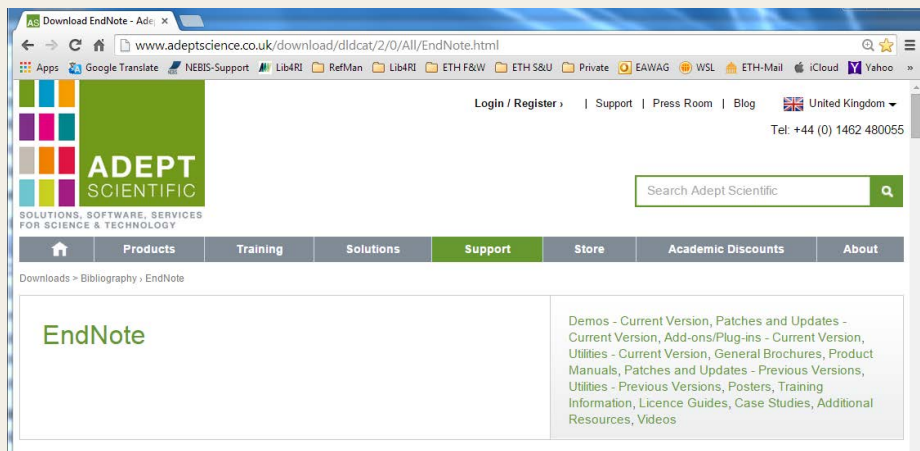
Lib4RI Endnote Quick Guide

- Lib4RI's Info #06 covers relevant essentials to work with Endnote X7

- Find it in your documentation or download it via our website:
  www.lib4ri.ch/services/lib4ri-info.html

Useful Links

- ↳ **Downloads**

  - http://endnote.com > Downloads
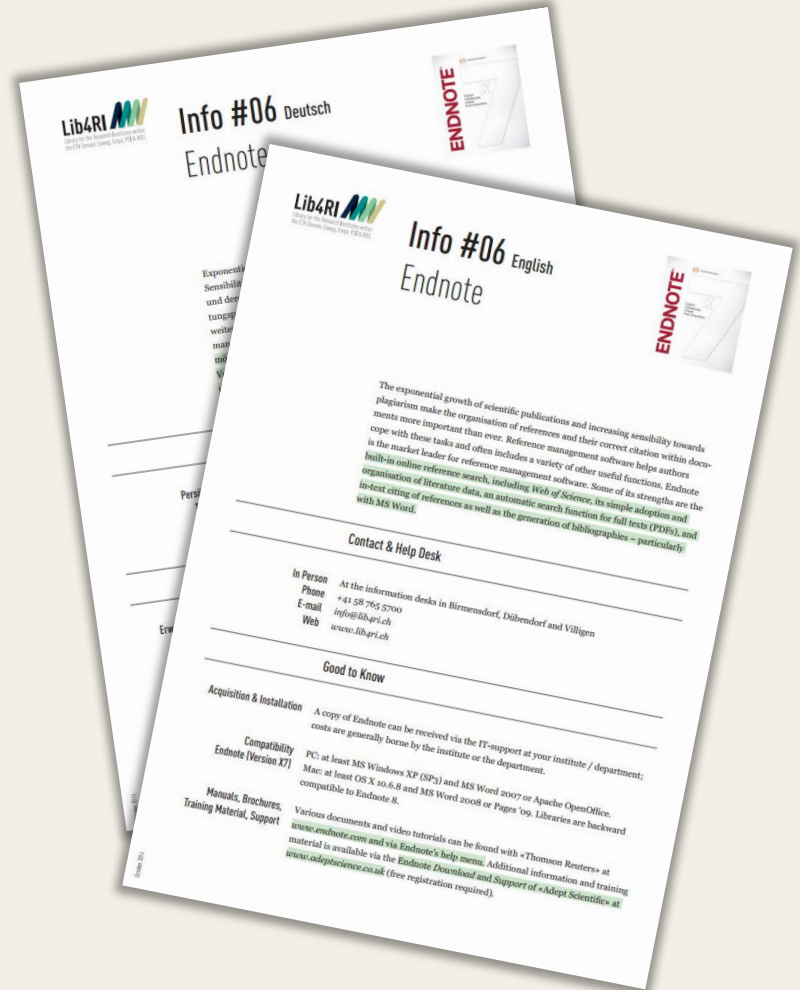
  - http://www.adeptscience.co.uk
    > Support > Download > Endnote

- ↳ **User Guides, Help, Tutorials, Training Videos & Classes**

  - http://endnote.com > Support

  - http://endnote.com > Training (incl. Little-Endnote-How-To-Book)

  - http://www.myendnoteweb.com
    > Help

  - http://www.youtube.com/user/EndNote Training

  - http://www.adeptscience.co.uk
    > Support > Downloads > Endnote

- ↳ **Support, Knowledge Base, Community, Forum, FAQ, Blogs**

  - http://endnote.com > Support

  - http://community.thomsonreuters.com

  - http://www.myendnoteweb.com
    > Connect (registration required)

  - http://endnote.com > Support
    > Endnote FAQs

  - http://www.adeptscience.co.uk
    > Support > Knowledge Base
    > Endnote

  - http://www.adeptscience.co.uk
    > Support > Knowledge Base
    > Endnote Web

  - http://adeptscience.co.uk > Support
    > List Archives > Endnote Archive

  - http://endnote.com > Blog

Thank you

Don't hesitate to ask for our assistance

Stephanie Hofmann & Bobby Neuhold

Lib4RI - Library for Eawag, Empa, PSI & WSL
Überlandstrasse 133 • 8600 Dübendorf
tel +41 58 765 57 00
info@lib4ri.ch
www.lib4ri.ch